



# Building a successful omnichannel digital strategy for HCPs

How to plan and implement exceptional experiences that improve HCP engagement, build long-term brand trust, and embrace a smart approach to innovation

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Digital experiences permeate modern life. We do much of our shopping online, date via mobile apps, and track our exercise with wearable devices. Healthcare is no exception. Nearly seven out of 10 people (69%) now use telemedicine because it's more convenient<sup>1</sup>, and 94% of people who recently used virtual care told J.D. Power they'd likely do so again<sup>2</sup>.

Pharmaceutical and life sciences companies, however, have largely lagged behind in building best-in-class digital experiences—for understandable reasons, which this e-book will explore. But it's clear that doctors, for instance, would like to see better digital experiences: 84% of doctors want to maintain or increase the level of digital interactions they have with pharmaceutical companies, according to a BCG study<sup>3</sup>.

Unfortunately, that same study found that nearly half of the pharmaceutical companies the researchers surveyed scored below average in the delivery of digital content to healthcare providers. Like their patients, they're already accustomed to going online whenever they're researching almost anything, from new restaurants to the reason so many police sirens are going off in the neighborhood. If they're thinking of prescribing a drug that's new to them, they'll expect to find the answers to the questions in an easy-to-access digital format.

Pharmaceutical companies need to prioritize creating and executing on a well-considered digital strategy. This is a high-order investment, and those organizations that don't think of it in this way will lag behind their competitors who do.

In this e-book, Think Company will provide you with all the essential pieces you need to put a strategy in place to provide a high-quality digital experience to healthcare providers—all while remaining compliant. **Let's dive in.**

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<sup>1</sup> AHIP. New Survey: Americans Value the Convenience and Simplicity of Telehealth for Their Care. Press Release. 1 December 2022.

<https://www.ahip.org/news/press-releases/new-survey-americans-value-the-convenience-and-simplicity-of-telehealth-for-their-care>. Retrieved 29 May 2024.

<sup>2</sup> J.D. Power. Telehealth Emerges as Preferred Channel for Routine Care While Increasing Access to Mental Health Treatment, J.D. Power Finds. Press Release. 29 September 2022. <https://www.jdpower.com/business/press-releases/2022-us-telehealth-satisfaction-study>. Retrieved 29 May 2024.

<sup>3</sup> Friedemann Wolf, Ulrik Schulze, Suchita Shah, Ivan D'Avanzo, Friedrich Moeckel, and Enzo Lago. For Physicians and Pharma, Hybrid Engagement Is the New Normal. BCG. 19 April 2023. <https://www.bcg.com/publications/2023/hybrid-engagement-is-the-new-normal-for-physicians-and-pharma-companies>. Retrieved 29 May 2024

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# Challenges to delivering value in the face of strict regulatory limitations

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The reality for most pharmaceutical organizations is that medical products can be complex and often need to be used or administered in a very specific way. And there are several serious regulatory challenges that can make it difficult to create a digital product that's meaningful to end users.

## Typical digital goals in pharmaceuticals

Let's start by laying out the typical goals that pharmaceutical companies have for the digital experiences they want to create. They usually fall into one of three categories:

- **Providing medical information** - Physicians, nurses, medical staff, and patients need readily accessible, easy-to-understand information on how to use medical devices and medications—often so that HCPs can pass along details in patient conversations. This is especially important for rare disease types and/or complex disease states.
- **Assisting HCPs with research** - Healthcare providers are often looking for new information to help them in their line of work, like recent studies or papers, conference takeaways, answers to complex patient questions, and more.
- **Public health education** - Healthcare product companies are limited in what they can say about their products, but they do possess expertise and resources that can be applied to benefit the public while also strengthening their brand. Broad-based health education that's not related to a particular drug doesn't need to go through regulatory approvals.

But as pharmaceutical leaders like you know, accomplishing the goals above is much easier said than done.

## Challenges in developing digital pharmaceutical products

We've seen many times that in the pursuit of these digital goals, various regulatory and market roadblocks typically surface, creating common barriers for organizations to overcome.

### LANGUAGE AND COMMUNICATION

Due to regulation in pharmaceuticals, companies are strictly limited in what they can say and where. These regulations don't just dictate the specific language to use, they also specify font sizes and even formats. And unfortunately, much of this required language isn't ideal for everyone—and can often be difficult for non-clinical audiences to understand.





There are three basic communication tracks that organizations take to try to get around this problem:

- **Net new:** Creating new content for digital products in regulated environments requires a lot of fact checking and putting it through regulatory approval processes, which can take quite some time to complete and often requires substantial changes.
- **Derivative:** Often, it's faster to reuse content that's already been approved, but this can cause problems if there's nothing that's appropriate for the desired use case.
- **Saying very little to avoid regulatory requirements:** While this approach avoids regulatory problems, it rarely provides much value to patients and healthcare professionals.

### **SPEAKING APPROPRIATELY TO THE RIGHT AUDIENCE**

Another challenge is knowing who to address and when to do so. Manufacturers have the opportunity to engage with healthcare professionals even before their treatment enters the market. Disease state campaigns provide pharma organizations with the opportunity to raise awareness for a disease and educate providers about causes, symptoms, and other disease elements.

Once a manufacturer's treatment has been approved, content should include messaging for clinicians about the treatment's benefits and efficacy as well as include patient enrollment details.

Like healthcare providers, patients also seek out publicly available information about treatment options and products. Content developed for patients should evolve to consider their unique needs. Each audience and situation will require a different approach to developing content.

## **BUILDING SIMILAR DIGITAL TOOLS IN AN ALREADY SATURATED LANDSCAPE**

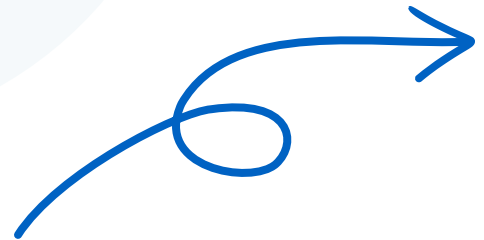
When building digital products, pharmaceutical companies often seem to take the approach of, “If you build it, they will come.” But since many digital tools and sources of information already exist, this approach doesn’t always work. If your team wants to build a new portal or website, for example, you’ll need to address the full competitive landscape and build something better, easier to use, and more valuable—not just something you can build quickly.

## **SETTING THE RIGHT TONE**

Another common mistake is creating communications that are overly positive or marketing-oriented. First, patients and healthcare providers need to be able to set the tone of communication. Many conditions cause a lot of suffering, and treating or coping with them can be difficult and complex. Communications should acknowledge this. In order to be successful, it’s most important that communication channels and messages within digital products add value and lend to problem solving for the intended audience.

## There is a path forward

We’ve seen first hand that while there are many complex challenges, there are also many solutions and proven paths you can take to meet your goals. In the following sections, we’ll outline the steps to planning and designing digital experiences for your audience despite the challenges you’re facing.



CHAPTER  
2

## Visualizing and planning the HCP journey

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When making a plan for your digital strategy, there are many people to consider—doctors, nurses, caregivers, payers, healthcare business providers, medical staff, patients, and more. It’s always important to understand the regulatory constraints when communicating with them and how to build an effective plan.

But it’s equally important to build experiences that provide value at the right moment and build long-term trust. The needs of your various users are different. The key to staying ahead of the competition is conducting research into the audiences that are important to your company and then designing products that include features and capabilities they need.

Healthcare providers need timely, easy-to-find digital information that can help them work better. In this chapter, we’ll lay out the best practices in forming a plan to produce the best results.



# Understanding the HCP journey



To develop meaningful, useful digital experiences for HCPs, it's critical to understand their journey, and a journey map can help your organization do just that. A user journey map, also commonly called a customer journey map, is a tool that communicates a user's "journey"—the path they take while they navigate an experience. User journey maps shed light on the emotional state at specific points during an experience, and can be used to highlight critical touchpoints along that journey. In general, user journey maps help stakeholders see the digital experience within a larger context.

User journey mapping also goes beyond the tool's intention and illuminates how the user actually uses it and experiences it. If there's a problem in the user journey, a user journey map allows you to identify the problem in the real world—and resolve it.

The most important benefit of a user journey map is that it highlights any gaps between intention and reality. Digital experiences designed by even the most seasoned UX teams can still have a distinct difference between how they're intended to be used and how a user moves through them. There's always an element of unpredictability.

Customer journey mapping identifies "easy fixes" to alleviate obvious pain points while planning for the future, while also providing insight for creating a roadmap to fixing existing problems and building future solutions. But it's not all doom and gloom—user journey maps also identify what's working. This information provides an opportunity to learn from what's successful, too.

While journey maps come in many different formats, there are a few important (and familiar) components that should be considered:

- **User archetype:** Simply put, the people who experience the journey—who the journey map is about. The archetype should be rooted in data.
- **Scenario:** The scenario is the situation (or journey) that the map addresses. A scenario can be real or anticipated (if the product doesn't exist yet and is in the design phase), high-level or detailed.
- **Journey phases:** The stages in the journey; the steps the user moves through. Examples include discovery, purchase, adoption, evaluation, expansion, etc.
- **Pain points:** The moments in the users' journey that cause friction, confusion or drop offs, and point to spots for improvement.
- **Opportunities:** Insights gained from customer journey mapping that help us understand where and how we should optimize the product.

To learn more about customer journey maps and how to create them for HCPs, read our [Guide to user journey mapping](#).



## Preparing to design and build for HCPs

HCPs are the gatekeepers who will make or break the success of your products—and the more trust they have in your brand’s effectiveness and safety and the information you provide, the better your success. Implementing the right digital HCP engagement strategies can not only help improve engagement, but also position your organization as a leader in the field.

Here are the six key steps to build a foundation for providing better HCP engagement through your digital experiences.

### 1) RESEARCH HOW HCPs ARE LOOKING FOR INFORMATION TODAY

As an evidence-based design company, we believe it’s essential to gather data about how the people who use your tools and content are actually using them. The field of medicine is inherently evidence based as well—so digital decisions should follow suit.

To increase HCP engagement, it is essential to do up-front design research early in a new initiative (or before a redesign) as well as throughout your project. This regular research cadence allows you to continually iterate and improve on the experience HCPs have with your content.

After you gather preliminary research data on how the HCPs that use (or don’t use!) your digital tools are looking for information, socialize the research findings with product marketing teams, agencies, and other promotional marketing decision makers in your organization. Tell the story about how healthcare professionals want to consume content.

Don’t assume that HCPs are engaging with information in a specific way. For example, one pharmaceutical company’s team research found that their HCPs were using many different digital platforms including Doximity alerts, UpToDate, and email. Based on this research, they created an omnichannel experience for healthcare professionals so they’d receive the same message from each platform—even including a Google search.

## What is design research?

At its core, design research is about understanding user needs and assessing priorities before creating solutions to ensure you build the right thing. By incorporating design research into the early stages of your design process, you can more easily focus your goals, streamline your processes, and ultimately create something that meets users’ needs. Quantitative research is fundamentally about numbers, focusing on data that can be precisely measured to test hypotheses. Qualitative research provides insight into less defined questions and typically involves user interviews.

Learn more about design research, the stages of the research process, and how to choose the right research method in our [design research guide](#).

## 2) IMPLEMENT A COMPLIANT SEO STRATEGY

HCPs rely heavily on Google to find information today. Find out whether the HCPs that you serve are frequently Googling and then clicking on the first few results. If so, you should expose as much of your content to search engines as you can while complying with industry regulations.

A few key things to consider to increase visibility:

- Code your digital properties in a way that ensures search engines can interpret the content appropriately.
- Search engines assign higher credibility to sites that are usable, fast, and mobile-friendly.
- Ensure your SEO is on par and serving your content to HCPs when and where they need it, which will set you apart in the industry and improve HCP engagement.

## 3) AUDIT YOUR CONTENT AGAINST THE JOBS-TO-BE-DONE FOR HCPS

One common misconception we've noticed among the pharmaceutical leaders is the belief that HCPs are resistant to information from the makers of the products they prescribe. In fact, we've discovered that this assumption couldn't be further from the truth.

Healthcare providers often tell us that pharmaceutical organizations can provide them with the most reliable information about their own products. The difficult part is finding the right information at the point of need—often when HCPs are working directly with patients and looking for product information the same way they'd search for any other type of digital content.

Take the initiative to discover and think carefully about the [jobs-to-be-done](#) for HCPs who need the specific information your company can provide, and audit your content against that information. Does your content answer the right questions, and is it accessible through the methods HCPs use to research information today?

During this auditing process, don't just inventory and address what you have today, ask yourself what are HCPs asking for that you don't have—or what your competitors have that you may be able to develop. Use this exercise to address content and service gaps and create a plan to fill them.

## 4) DETERMINE HOW EASY IT IS FOR HCPS TO FIND AND USE YOUR INFORMATION

Now that you have data on how healthcare professionals are looking for and accessing your content, and you know more about their jobs-to-be-done, take a look at how your organization is connecting the dots and improving digital HCP engagement by making information quick and easy to find.

When performing this audit, consider UX essentials like:

- **Information architecture:** Think about the navigational experience of HCPs who come to your site or medinfo portal looking for information that's important to them. How are you providing ways to help them find what they need? Do you rely only on a navigation menu to surface content, or are there other prominent areas where you can showcase popular or in-demand content?
- **Naming conventions:** In your research, make sure you find out what language healthcare professionals are using to find and search for information. Identify whether you're using the same language and where there may be discrepancies. Avoid jargon and technical terms specific to your organization: If it isn't

meaningful to healthcare providers, don't use it. Instead use terminology they're familiar with. Doing this can increase your digital engagement and position your company as relevant and well versed in the healthcare industry

- **Format:** Understand how healthcare professionals prefer to use or engage with different types of content. Do they want video, text, downloadable documents to print out, or something else? (This should become clear in the research you conduct.) Then, determine how well your digital experience meets those needs. For example, if you have important content that HCPs need to be able to access quickly from a mobile phone, it shouldn't be buried deeply in a PDF that's hard to download and digest. Instead, that content could be presented on a webpage with an option to download a PDF version if preferred.
- **Accessibility:** Digital accessibility is usability. Ensure that your content can be used by your entire audience. Make sure your PDFs are accessible and that healthcare providers using a screen reader can find and read them. If you have video content, like a video showing the Mechanism of Action for a product, make sure closed captioning or a transcript is available. Digital engagement goals will suffer if your audience cannot access your content successfully. To increase HCP engagement, make sure that your content is accessible by everyone in your target audience. Inclusive design can help you expand your reach and show your target audience you care about diversity—a non-negotiable in healthcare.



## 5) DEVELOP A NON-CLINICAL, NON-MARKETING DESIGN AESTHETIC

In the research stage of many pharmaceutical projects, we've learned that healthcare providers have become universally sensitive to marketing materials. If there is one piece of feedback we hear constantly from HCPs, it's something like this: "When I go to a site and see a photo of a patient dancing across a field of flowers, I know I'm being sold to."

HCPs are regularly inundated with marketing content and solicitation, which also makes them cautious about how much and to whom they give their information to, making it more challenging than ever to increase HCP engagement through digital channels.

In the course of your UX work, your team should be thinking about your approach to your overall brand aesthetic while addressing privacy concerns in forms, account creation, and other requests for data and information.

Having a good design system in place can help. When you define a global system with coordinated design and component standards (as well as a pattern library), it provides guardrails for product teams and brands. This helps eliminate issues like visual noise and excessive marketing imagery, and puts focus on what matters from a brand perspective: your logo, brand colors, and the exact information that the HCPs in your audience are looking for.

## What is your organization's level of maturity for user research?

While it's vital to pursue user research in the course of your product design and development work, it's just as important to understand how to pursue user research based on your research maturity—and how ready your organization is to invest in and pursue the appropriate activities.

There are four stages of user research maturity:

- 1. Nascent:** Your team is exploring basic moderated usability testing. The goal is to start proving out the value of user research to the leaders at your organization. You either have no user research data or very little, and you're looking for ways to evangelize the value of spending extra time and money on user research.
- 2. Emerging:** When your user research efforts are at an emerging stage, you're usually doing more product discovery. Your goals are focused on building up buy-in and integrating user research findings into the product lifecycle.
- 3. Operational:** At this stage, research leaders have more say in how products are being built, and research is not only integrated into agile planning, it directly impacts sprint work. Your goal is to start thinking more strategically about your research work and the broader business impact.
- 4. Strategic:** User research is now fully integrated across the organization, teams, and product suite. Your goal is to maintain a system that allows user research to stay relevant and valuable to the business without regressing to earlier stages.

To learn more about each stage and strategies for increasing your organization's user research maturity, read our blog post: [Understanding your organization's user research maturity](#).



## 6) THINK CRITICALLY ABOUT HOW YOU'LL MEASURE THE SUCCESS OF YOUR DIGITAL HCP ENGAGEMENT STRATEGY

As you implement a regular research cadence, pair the findings with measurement goals to determine the success of your efforts. You can use analytics, event tracking, heat mapping, and usability testing to continually measure HCP engagement, implement research-based solutions, and improve over time.

Make sure you're establishing goals that are tied to the information or content type you're measuring and the job-to-be-done. This will help you measure for true engagement and not just empty KPIs.

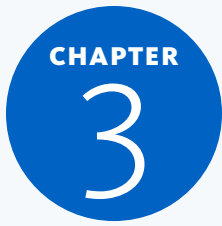
For example, if a healthcare provider is looking for dosing information, and they navigate to the manufacturer site, find what they need, and quickly leave, this interaction can be considered a "win." Don't make the mistake of assuming that metrics like longer time on site mean "better" engagement if your goal is to give healthcare providers quick and efficient access to the content they need.

You can identify various tactics and solutions to measure all levels of engagement. If healthcare professionals access your content with buttons or download links, focus on measuring those events. For long-form content, measure scroll depth on that page. In general, avoid measurement for measurement's sake—and don't focus on surface-level KPIs that don't tell the full story.

### Engage with HCPs when and where they need pharmaceutical information

Pharmaceutical companies like you have an opportunity to improve your reputation among HCPs, increase trust, and provide the most relevant content to your audience—positioning you as a leader in your field. You can get there by listening to the voice of the people you serve and making your digital experience a business priority. The right digital HCP engagement strategies can transform the way you do business.





CHAPTER  
3

# Why content strategy is essential for success—and how to develop an approach

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Pharmaceutical companies not only need to comply with complex regulatory requirements and understand the needs of their users, but they must also connect many types of information and resources to their audiences through various brands, websites, tools, and digital platforms—ideally creating one unified, responsive experience that serves healthcare professionals with in-the-moment answers.

With so much content (and multiple brand and user experiences to consider), building a truly omnichannel experience can seem daunting without content strategy at the core.

A well-executed strategy delivers the right content at the right moment in a customer's journey and in a format that the customer prefers.

## The case for putting content strategy front and center

Content, in all its various formats, is essential to getting information to people. Whether it's an email text, blog posts, web copy, FAQs or some other form, pharmaceutical companies need a constant stream of updated content for HCPs, patients, and other stakeholders. Pharmaceutical companies face more inherent complexity due to the highly regulated nature of their business than do nearly all other industries in building, approving, publishing, and serving up content.

But while creating and executing on a content strategy is challenging, it forms the center for every other strategy that connects people to information—more than marketing, visual design, and even digital product design. Without a solid content strategy, a pharmaceutical company's marketing, communication, and digital design functions cannot be effective. And typically, to do content strategy well, pharmaceutical companies need specialists with relevant expertise.

## Common content challenges

Content strategy and creation are challenging for any organization. First, the strategy must align across multiple channels to create a seamless experience. But also, the process of creating, governing, and managing content can be challenging in the following ways.

### **CREATION**

The most significant issue we see when organizations try to move to an omnichannel experience is that stakeholders assume they know which information is most important to users. While gut instincts can be valuable in some creative endeavors, you should generally have a more concrete understanding of what your users need and when.

You can do this by including time for analytics, UX research, and feedback loops in your content creation process. This will result in a user experience that feels cohesive and responsive to actual user needs. Having recurring syncs and collaboration sessions with visual design team members also helps ensure that the components and elements they are creating better align with content needs and wants. These collaborative sessions can include:

- Discussing examples of how content should live on page layouts
- Sharing which components are appropriate for common categories and topics
- Learning best practices so content and visuals create visual harmony and contribute to a better understanding of your site or product

## GOVERNANCE

Another common issue is a need for more support and pull-through for content strategy and governance. Working within significant regulatory constraints and long approval cycles, content creators in the pharmaceutical space may become overly reliant on practices and formats that have worked well in the past. Teams may re-create the same customer presentation or PDF year after year without considering if it's the right content and format for the customer and without getting it approved across all relevant channels.

To combat the status quo and change behaviors, your organization must devote time and resources to socializing the omnichannel content approach behavior. Showcasing success stories, sharing best practices, breaking down silos, and providing training and support can help get people on board with planning and executing an omnichannel approach.



## A deeper dive into digital content strategy

A solid digital content strategy can help you earn customers' trust by guiding them through complex processes and getting them the right information at the right time. Investing in your business' content strategy can enhance your customers' experience of your products and services and develop a robust and consistent brand voice across every customer touchpoint.

Through the process of building a content strategy, your team gains a better understanding of your audience and the content they want and need—content that keeps them coming back

If you're interested in taking a much deeper dive into developing a digital content strategy, read our [Guide to digital content strategy: From concept to creation](#).



## Steps to building a robust content strategy in pharmaceuticals

Developing a content strategy is complex, and it can be hard to determine where to start and how to proceed from there. Here's a step-by-step approach.

### **1) ALWAYS START WITH RESEARCH**

As we laid out in the previous section, research is the foundation for building a holistic digital experience across brands and channels. Understanding your user journey through customer journey mapping can help you to connect the dots between the customer's needs and wants throughout their lifecycle or engagement with your organization, and the channels and content that would best serve the customer in critical moments.

### **2) UNDERSTAND YOUR CONTENT ECOSYSTEM AND PROCESSES**

You will also need to understand what content you have today and what content gaps you may need to fill to best meet customers' needs. Is your content available in the format and on the devices that customers prefer? What content improvements or transformations can help you connect with your audience during crucial decision-making moments? Do you have content currently used at in-person events like Medical Congresses that could benefit from digital delivery?



Activities like content inventories, audits, and ecosystem mapping can help you identify what content you have today, where it originates, and how it is being created, approved, delivered, and updated.

Large healthcare and pharmaceutical organizations can also benefit from content process and workflow mapping to highlight content silos, bottlenecks, redundancy, and churn. What efficiencies can you find in your content operations? Maybe two separate teams are spending valuable resources creating similar content. Perhaps there are ways to plan to get critical content assets created and approved for more than one channel at a time.

### 3) MOVE TOWARD STRUCTURED CONTENT

There's so much time and effort involved in creating, reviewing, approving, and publishing content in regulated industries. All of this effort should result in content ready to be shared in every relevant channel. Can you automatically pull your product descriptions, safety information, and other prevalent chunks of content from a single data source? How is your organization using content tagging or metadata to help automate delivery across channels and experiences?

With a structured content approach, you can move closer to creating and approving an asset once and then publishing it everywhere.

## Using personalization to build trust

Now that you have a strategic foundation built on content strategy, you can make a plan to implement personalization. Personalization is a powerful tool for companies who want to improve customer experience, engagement, and loyalty. For pharmaceutical companies, personalization can provide significant value to healthcare professionals and patients—most often with lifestyle and chronic disease products where a long-term relationship between patient and brand is crucial.

## Benefits of personalization for pharmaceutical companies

Ultimately, providing your customers with the most relevant information effectively and efficiently leads to greater customer satisfaction, retention, and potential for improved patient care.

A few benefits include:

- **You'll alleviate uncertainty with easily accessible information:** In an industry that can be high-stress and seemingly filled to the brim with information, the right pharmaceutical information at the fingertips of your patients and HCPs can help alleviate uncertainty.
- **Role-based personalization will save users' time:** Patients aren't digging too deep into the weeds; healthcare providers don't have to search through massive amounts of data to find the resources.
- **You'll enable more effective communication:** The communication between healthcare providers and their patients is improved through easy-to-share articles and data, like symptoms to watch out for, side effects to expect, and so on. Ideally, this will also lead to higher quality patient care.
- **Real-time support will address specific user needs:** Chatbots and similar features allow users to surpass search and get real-time support when needed on a specific topic.

- **You'll improve trust:** Providing users with customized data or the ability to set up their dashboard to view the information most relevant to them builds confidence and trust—and makes for a better overall customer experience (for healthcare providers and patients alike).

## **FUNDAMENTALS TO BUILDING A PERSONALIZATION STRATEGY**

In the pharmaceutical industry, there are particular challenges in developing a digital personalization strategy given the fine line between privacy and personalization. How do you know how much data is too much to collect—and what data do HCPs actually need?

While the solutions may initially seem obvious to people new to this industry, there are many considerations when balancing personalization and privacy. Providing easily accessible, compliant content when and where your users need it is no simple task. The best practices that follow are tailored to the pharmaceutical industry but can be applicable across many regulated industries.

### **CONTENT TAGGING**

For many pharmaceutical brands, content comes from multiple sources. For a single brand or product, different teams may create content intended for the patient population and for healthcare professionals. There may also be a variety of teams ranging from brand marketers to data scientists generating a range of content, including product overviews, real-world evidence models, and clinical data outcome reports. With content being produced across disciplines and departments, keeping a cohesive content strategy and helping users find the information they need can be complex—but not impossible.

Consistent content tagging is a great way to help ensure your content is searchable and easily consumable. By tagging your content internally, you can more easily group relevant content and appropriate audiences making it easier for users to search on your site or medical portal.

On the legal side of things, tagging makes it easy for compliance folks and legal reviewers to see precisely what will appear if a user does a specific search. This ability is crucial for reducing unintentional claims and related legal issues.

### **MASTERING SEARCH**

As mentioned above, if your content isn't tagged correctly, it will be complicated to have an effective search. But there are other issues inherent in search, specific to pharmaceutical companies.

While many teams and less-experienced consultancies would want to implement an algorithmic search (the best-in-class and most common search option), this is a significant issue if you're in pharmaceuticals. Even "fuzzy search"—when content is suggested after an exact match isn't found for phrases or sentences in a database—can be a compliance minefield.

Because of the regulatory requirements surrounding claims and adverse events, pharmaceutical companies must work closely with their legal teams to ensure that searchers are getting the information they need while the company also remains compliant with FDA laws.

## **ROLE-BASED ACCESS**

In conjunction with tagging, on portal or login-based websites, you can use role-based access to govern the display of secure content and ensure that content is only viewed by certain audiences. Maybe you have secure economic impact data that may only be relevant to formulary decision makers, or mechanism of action overviews that should only be seen by healthcare providers.

If those business-to-business customers are already logging-in to a digital portal, you can use a combination of tagging and role-based access permissioning to provide a curated and compliant content experience for those customers.

## **SOPHISTICATED CHAT EXPERIENCES**

In healthcare, building and developing an ongoing relationship with the patient or HCP is crucial. Chatbots (and they don't necessarily need to be AI-powered) are an easy frontline way to quickly and efficiently meet the customer where they are. But even better, a chatbot can be a practical way to connect that person to someone at the organization who can field their question or request.

Getting people in touch with a human as quickly as possible also helps meet requirements for reporting adverse events. It allows for more context and creates an understanding of the true nature of the issue. In the healthcare industry reporting adverse events on time is crucial and chat experiences are often the first point of contact.

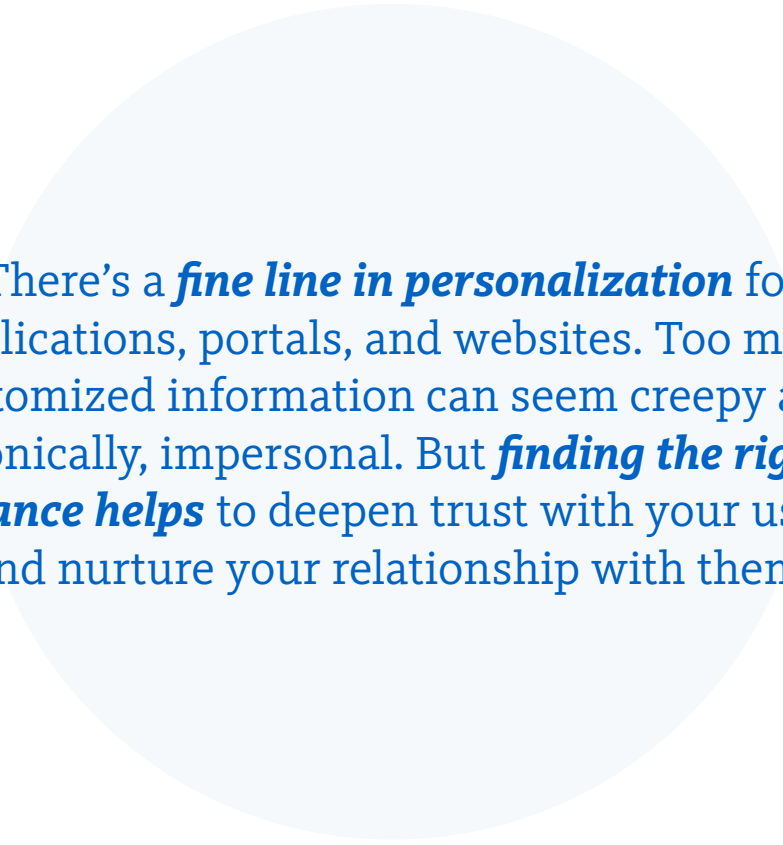


## FIRST-PARTY DATA

There's a fine line in personalization for applications, portals, and websites. Too much customized information can seem creepy and, ironically, impersonal. But finding the right balance helps to deepen trust with your users and nurture your relationship with them.

By utilizing first-party data, people feel a sense of control about how much information they're sharing with you—and in regulated environments like healthcare, first-party data helps to sidestep some of the regulatory issues that can come with data collection.

Empowering your field-facing team with the right tools and systems (like CRMs) to understand customer data allows them to leverage that information to deliver relevant content in the future. (Better than scribbles on a sales rep's legal pad, right?) This centralization of first-party data makes it easier for anyone in an organization to uphold a continued level of service and stay within the legal requirements surrounding data collection.



There's a ***fine line in personalization*** for applications, portals, and websites. Too much customized information can seem creepy and, ironically, impersonal. But ***finding the right balance helps*** to deepen trust with your users and nurture your relationship with them.



CHAPTER  
4

## Best practices for designing and building HCP-facing tools

Now that your strategic foundation is laid, you can move on to designing and building tools that will perform.

While the idea of tools like medical information portals—sometimes called MedInfo portals—is exciting, the experience can often be disappointing. Many pharmaceutical companies report low engagement, and healthcare providers often say they're frustrated using pharma-sponsored portals.

Investing in your digital tools can feel like a lot of work just to provide a slightly better user experience. After all, most HCPs are just looking for information, and if you have the required data on your site, why should you invest further? The answer is that providing a better experience for healthcare providers with a thoughtfully-designed tool can help HCPs deliver better patient outcomes and significantly strengthen the relationship between healthcare professionals and pharmaceutical brands.



### A deeper dive into HCP portal strategies in pharmaceuticals

Today, healthcare professionals are spending a larger portion of their work day in front of a screen looking for information to support better patient care. HCP portals provided by pharmaceutical companies are one of the most vital tools for searching and finding essential information—from patient treatment information and advice to forms and documentation used by medical office managers.

Pharmaceutical companies that want to improve their brand reputation and better engage healthcare professionals must focus on strategic improvement of HCP portals and related tools. Even more, companies looking to compete with those leading the way in the industry (or stay one step ahead of those who aren't caught up yet) must make their digital experiences as helpful, intuitive, and efficient as possible using modern UX practices. HCPs want to use and access tools in their work the same way they are able to gather digital information outside of their jobs.

Thik Company conducted an analysis of 39 HCP portals from the top 20 U.S. pharmaceutical companies and, with the aid of our pharmaceutical-focused UX leaders, created a detailed report on what's working, what's trending and what pharmaceutical companies can do better.

Read our report: [Modern HCP portal strategies for pharma leaders](#).



## A closer look at the benefits of well-designed HCP-facing tools

When we refer to HCP-facing tools, we're talking about websites and portals built and maintained by pharmaceutical businesses to share information and engage with HCPs. The content on these tools varies. There is usually both promotional and non-promotional content—and choosing the right balance is critical.

There are many ways that a thoughtfully-designed portal can be an asset to your business. Here are three of the top benefits we've seen.

### **INCREASED EFFICIENCY**

One of the primary benefits our partners have experienced when they invest in their digital tools is the increased efficiency that comes with improved team collaboration.

A structured content model and governance process—two critical components to a comprehensive content strategy—help streamline legal, medical, and regulatory reviews, allowing your organization to publish content much more quickly. And setting up your content management system (CMS) with built-in safeguards and best practices translates to easier and more efficient content creation, not to mention better relationships between your brand, medical, and review teams.

Containing all of your medical content and product information in a single repository also supports a “write-once, publish everywhere” strategy, which is especially valuable for organizations maintaining separate content databases. You can streamline your processes to flow from a single database of content that can be used to create web pages in your portal, medical response letters, call center verbatims, healthcare information, and chatbot responses.

## **REDUCED OPERATIONAL COSTS**

While an effective portal serves as a “front door” for HCPs, providing a one-stop shop for users, there are other operational benefits. The single most important internal benefit is that your organization now has a scalable tool for responding to requests in a compliant manner, reducing the time needed to respond individually to common requests.

Content contained within a singular repository also lessens the cost of maintaining multiple platforms. Having one source of truth makes it easier to review content as labels change, and reduces the resources required to ensure content is reviewed in a predictable schedule.

With less and less time to see patients, healthcare professionals increasingly rely on digital methods when seeking medical information. They often resort to human-to-human interactions only when they can't find the data they need. While it's valuable to provide healthcare providers with the ability to speak to your team members directly, you can dramatically reduce call center volume by offering more comprehensive information through your digital portals.

## **VALUE FOR EMPLOYEES AND HEALTHCARE PROVIDERS**

HCP-facing tools like portals improve the customer and employee experiences through enterprise-scale digital platforms and allow you to improve both simultaneously. Ideally, a mature portal can also replicate many typical face-to-face activities between HCPs and company reps, benefitting both groups at the same time.

Developing a sophisticated measurement strategy for your analytics can also provide insights to your brand and medical teams. Analytics can reveal market trends by tracking keywords leading to your portal, keywords used within your portal, and user behaviors connected to those keywords. For example, a trend in abandoned search terms may provide insights into competitive products or unknown interactions with new products on the market.

Some organizations' regulatory needs require that they gate more sensitive information behind a login to ensure compliance. If your site or portal falls in that category, the user experience can be effectively tied to your organization's CRM, providing insight to marketing teams and empowering them to do “next-best-action” marketing. This means that you can capture analytics that can point to the logical next step for users based on activity and queries, and gather data to create a better customer experience in the future.

A site or portal with a user login also allows you to customize the user experience for different HCP roles, providing customized service to general practitioners, specialists, nurses, retail pharmacists, institutional pharmacists, office staff, and other healthcare professionals.

# Nine best practices for modern HCP portals

If you have an existing HCP portal and are looking to keep up with best-in-class digital strategies, we've observed a number of approaches in recent years that are most common in pharmaceutical organizations leading the way. As you prepare to take action on a new or modern design, here are the best practices to improve it and build trust with HCPs.

## **1) KNOW YOUR AUDIENCE AND PROVIDE THEM WITH THE CONTENT THEY NEED**

While you might think that physicians are your main audience, all sorts of healthcare professionals rely on your medinfo portal. Nurses, for instance, are an underserved audience. They often rely on your tools and information when they're in or preparing for appointments. Nurses need to be able to interpret and communicate complex information to patients. Providing them with easy access to patient resources—like brochures, fact sheets, etc.—is vital for in-the-moment needs. After all, nurses are often the closest contact to the patient, spending time downloading information about their needs, and communicating with them before, during, and sometimes even after the appointment.

Healthcare business professionals like office managers and staff also utilize your medical information portals for things like billing, forms, or ordering product samples. Their customer journey is entirely different from that of a prescribing physician or a nurse, and they're likely one of the first points of contact at the authorization phase.

Your designed experiences should keep all of these audiences in mind. Consider things like ease of navigation, opportunities to fill out forms and make requests directly in the portal, downloadable patient brochures, and chatbots to help if further information is necessary.

## **2. MAKE IT EASY FOR HCPS TO CONNECT WITH EXPERTS**

While you can and should provide valuable, easy-to-find information in your portal, sometimes your HCPs will need to connect with an expert for a one-on-one discussion. Chatbots and live chat are obvious go-to's and can be great tools to move the user toward more detailed information. This feature can address what seems like endless scrolling and get the information to the HCP quickly.

However, sometimes an HCP needs more in-depth scientific information. Consider implementing a scheduling tool that connects HCPs to Medical Science Liaisons (MSLs) or Clinical Science Liaisons (CSLs). This can be an effective way to create simple access to humans as HCP needs become more specialized. Utilizing forms and tools like Calendly will help make the interaction seamless.

## **3. ENSURE TELEHEALTH INFORMATION IS EASILY ACCESSIBLE**

With the shift to telehealth appointments, HCPs now use many different tools to interact with patients online. Still in its infancy, the telehealth landscape is fragmented—and many tools don't talk to each other effectively. HCPs are often looking for information while in telehealth appointments, becoming even more dependent on digital information.

Don't let your medical information portal become a pain point for your users. Make sure telehealth information is readily available and easily navigable. Be flexible with your content. Think outside of



your traditional systems and invest in improving them so that you're not stuck within already-defined components and properties.

#### **4. CREATE MORE SPECIALIZED MEDICAL CONTENT**

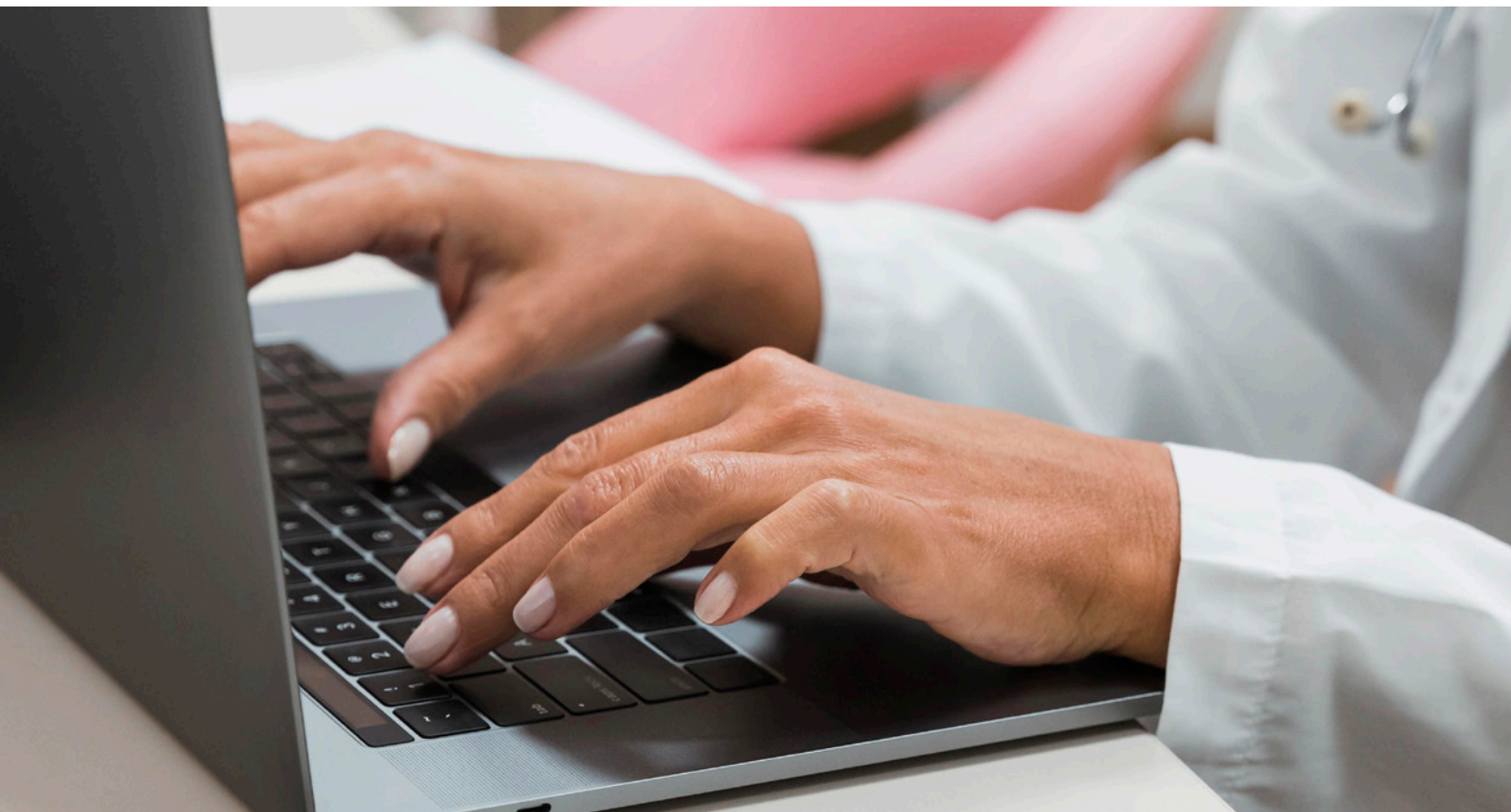
Become a trusted brand and resource by creating more specialized information that answers the questions and needs of your HCPs. Think beyond the basics, like dosage information. What makes your product unique, and what questions might a patient ask? User research can also help you understand and build out extensive content that can quickly help an HCP in a moment of need.

By making an investment and digging deeper into specialized medical information, your brand can become a go-to, trustworthy first stop for healthcare providers.

#### **5. BUILD TRUST BY ADDRESSING MISINFORMATION**

It's always been there, but with the emergence of Covid-19, misinformation became center stage. It's important to consider how to address this misinformation and assure HCPs that the information they rely on in your medinfo portal is trustworthy.

We've seen this handled in different ways, but we found "clinician reviewed" badges to be a simple, effective way to ensure users that medical professionals have reviewed and reinforced the information you're providing. Investing and partnering with clinician reviewers can help your pharmaceutical organization combat misinformation while improving brand trust and loyalty.





## **6. REMEMBER THAT CONTEMPORARY DESIGNS ENGAGE MODERN DAY HCPS**

In our extensive experience within the pharmaceutical and healthcare industries, we know steering clear of overly marketed design is important. HCPs distrust an influx of “happy patient” images, and too much of it can make the content you’re providing feel less useful.

Contemporary, clean design builds trust with HCPs—and they want to see more of it. We all interact with well-designed websites, applications, and tools daily, and there should be no difference in a healthcare provider’s work experience. Investing in design improvements doesn’t just stop at your medinfo portal. You should consider any assets that might be linked or downloadable, too—like your website and supporting documentation—and create a cohesive design across your products and tools. Implementing user research can help uncover positive HCP reactions to your products, auditing your current portals for accessibility can put you on a path to building trust, and creating and maintaining a design system can ensure cohesion and speed up time to market.

## **7. BUILD FOR ACCESSIBILITY**

Ensuring accessibility for all users is an unquestionable necessity for every site, and a foundational element to the digital experience. More and more organizations now realize how vital it is to democratize their content, and this should always be kept at the forefront when creating the design and content structure. One place to look when considering accessibility is color contrast. HCP portals that score low in accessibility heuristics often do so because of color contrast issues that make it difficult for individuals with low vision, vision impairments, or color blindness to read content and navigate the sites.

## **8. MAKE SURE THE DATA YOU PROVIDE IS USEFUL AND CURRENT**

The best companies examine data to give HCPs the information they want and need. 72% of physicians agree that data is valuable, but only 28% receive cost information such as estimated patient out-of-pocket costs. These physicians reported wanting more outcome data for treatment and medication options.

Companies can also use data to develop a more personalized experience for HCPs, targeting their specific prescribing behaviors, patient profiles, and history of interactions with the platform. Streamlining health information systems makes it easier to have access to this data. Internally this means updating legacy systems and combining multiple data sources like CRMs, ERPs, and analytics to provide a singular, consistent experience.

## **9. CONSIDER ADDING EDUCATIONAL VIDEO CONTENT**

As quality and access through smartphones have improved, HCPs have shown an increased interest in video content. A [2020 Stanford Medicine Health Trends Report](#) found that nearly half of all physicians (47%) and three-quarters of medical students (73%) say they are currently seeking out additional training or classes to better prepare themselves for innovations in healthcare. They are drawing from each other’s expertise through virtual learning platforms specifically created for the field of medicine.

# CHAPTER 5

## Embrace and prepare for innovation; Implementing generative AI

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Today, digital innovation is an inevitability for successful growth. Future-proofing your tools and embracing generative AI are top of mind for organizational leadership.

For AI in particular, it is a rare organization whose CIO is not under intense pressure to deploy it. And while it's good advice for any organization to develop a thoughtful strategy that mitigates risk and maximizes business value before adopting any kind of AI, highly-regulated industries like pharmaceuticals must be especially careful. After all, AI won't get a free pass to violate laws and regulations concerning how they use data and what they communicate to consumers.

That said, though navigating this regulated landscape can be tricky, it's worth it for the value it can bring.

### Strategies for smart AI implementation in pharmaceuticals

#### **START WITH A FOCUS ON CUSTOMER AND EMPLOYEE TRUST**

If the people who will interact with AI—HCPs, patients, and even payers—don't trust it, they won't use it. And if the AI you deploy goes unused, you've wasted an enormous amount of time, resources, and money.

#### **EMPLOY CHANGE MANAGEMENT**

Strong change management is critical. For example, even in the 2020s, some hospital systems are still using paper charts instead of electronic medical records (EMR), and even in the systems that have made this transition, a small but significant number of physicians decided to retire rather than use EMR. A digital assistant is a much bigger leap for a physician to make. Incorporating AI into one's daily work is an enormous change that will require building trust to be successful.

#### **CREATE A THOUGHTFUL COMMUNICATION PLAN**

Introduce AI gradually and ensure that there is a thoughtful, comprehensive marketing and sales plan to communicate how and why your organization is providing AI capabilities. Make sure to provide a human alternative, especially for activities like customer service that would have previously involved a human being. It will take time for users to become comfortable interacting with AI.

#### **DEMYSTIFY HOW AI AND MACHINE LEARNING WORK**

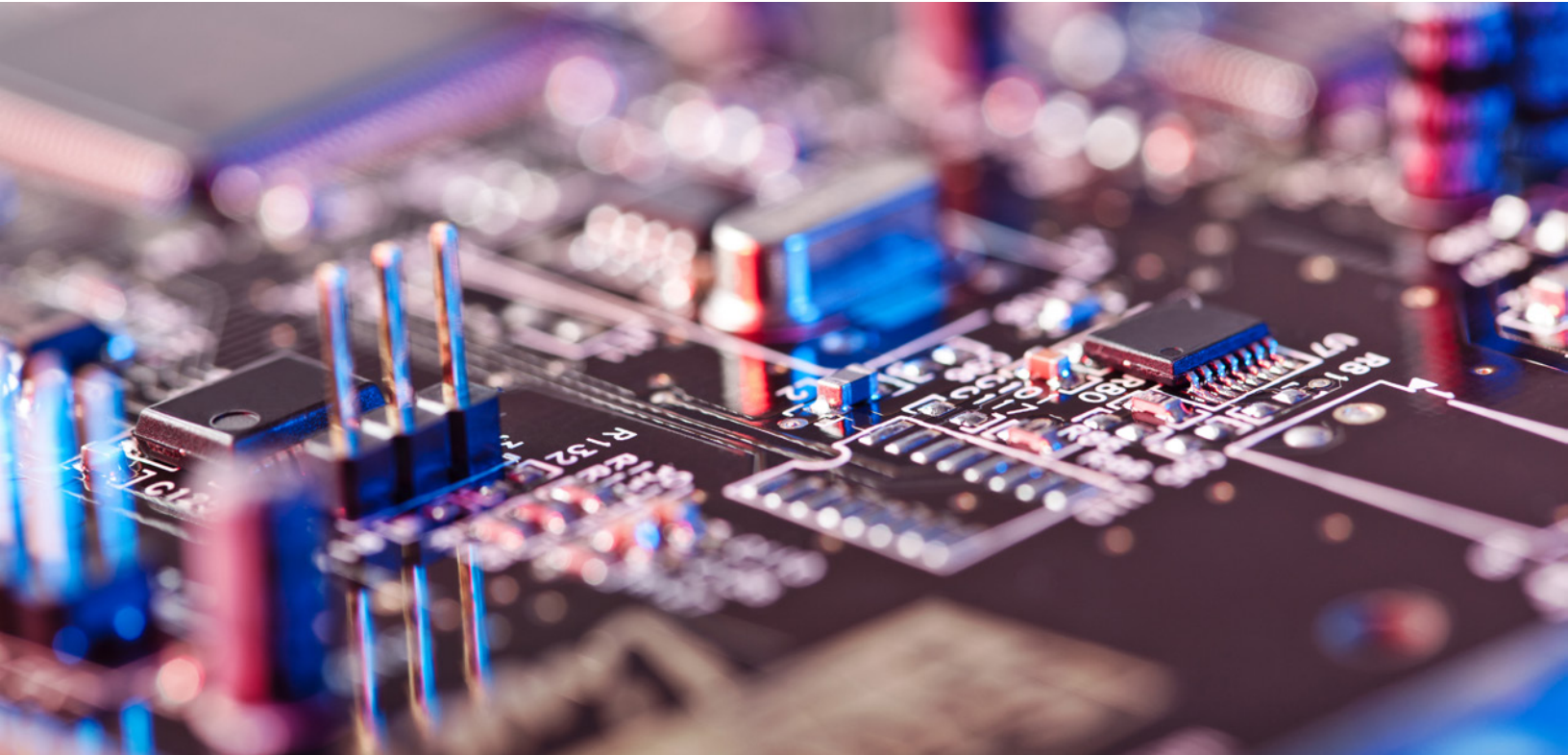
With employees, it's important to demystify how AI and machine learning (ML) work. AI is often viewed—and in some cases actually is—a black box where data goes in, results come out, and no one has any idea how the algorithm reached its conclusions. Wherever possible, employ transparent AI that enables end-users to follow its logic. When this is not possible, conduct workshops in which you conduct AI analysis of situations where the outcome is known to demonstrate accuracy and build confidence.

## **ESTABLISH A TRAINING PROGRAM AND PROVIDE HELPFUL INFORMATION**

Introduce AI gradually and, at each step, ensure everyone is well-informed and well-trained. Communication from all levels of the organization—especially from the C-Suite—must clearly and frequently explain the goals and benefits that AI will help achieve.

## **BE CLEAR THAT AI WILL SUPPORT YOUR EMPLOYEES—NOT REPLACE THEM**

Additionally, don't use AI to replace human beings—a move that is both unethical and ineffective—but rather to assist them. If people believe they'll lose their jobs to AI, morale will plummet, and trust will be nonexistent.



## Where to focus your generative AI efforts

While implementing generative AI is a high priority, as with any cutting-edge technology, there are challenges to avoid. For example, generative AI is well known for “hallucinating” information and references that are completely wrong or don't exist. And while the rate of hallucinations can be improved, it's unlikely that they will ever be completely eliminated—it's inherent in the generative process of creation. In the pharmaceutical industry, that's a big liability because providing doctors and patients with incorrect information could cause serious harm—even death.

Additionally, pharmaceutical companies face unique challenges and can only communicate with patients within a strict regulatory framework that governs not just the information they provide but also the format and even the font size. AI could likely be trained to work within these guidelines, but it only takes one mistake by AI to land a pharmaceutical company in hot legal water.

That said, while generative AI is not suitable for use cases in which it would interface directly with users (patients, providers, payers, etc.)—the risks are too great—that doesn't mean there are no applications for generative AI within the pharmaceutical industry, so long as they are implemented and governed with care.

Here are three ways pharmaceutical companies can utilize AI to create efficiency, but given the immense power and flexibility of generative AI, these only scratch the surface.

### **1) DOCUMENT PROCESSING AND SUMMARIZATION**

Pharmaceutical companies must follow many precise and complicated rules and steps in all aspects of the business, from conducting clinical trials to manufacturing, distribution, sales, and marketing. The knowledge and instructions for following these steps exist within the company, but finding and digesting them can be difficult. Generative AI could be trained on this information and then provide answers internally, which could save a great deal of time.

Generative AI could also be a huge time saver when summarizing research. Research documentation can run hundreds of pages long, and the text is usually very dense. Generative AI can parse through content to identify trends, themes, and major findings. The results would need to be checked to avoid any bias, but AI can give users a huge head start on understanding the critical findings.

### **2) PERSONALIZATION**

As mentioned previously, personalization can be a helpful tool in creating a better digital experience. Generative AI is starting to see rapid adoption in marketing operations across almost every industry because, when paired with other forms of AI and analytics, it can automate the creation of highly personalized communications for individual customers. For instance, if you previously bought flowers for your partner on your anniversary, generative AI could use your purchase history to write a personalized email with specific flower recommendations and send it exactly when you are most likely to purchase them.

Pharmaceutical companies will likely not be using generative AI for automated customer communications—without the support of humans—any time soon because it's not safe for patients or themselves. But on an ad hoc basis, generative AI can add a lot of value to communications.

For instance, generative AI could serve as an interface with the customer relationship management (CRM) system so pharmaceutical reps could instantly access descriptions in natural language of recent interactions with specific customers. It could also work in the other direction, with AI automatically taking notes on calls and other interactions, which it would then enter into the CRM system. And on an ad-hoc basis, AI could create personalized communications, though it's absolutely necessary that reps check their content before sending—full automation should be prohibited. Given generative AI's predilection towards hallucination, there are big significant compliance and regulatory concerns. Plus, if the AI has access to information in the CRM, there's always the possibility it could disclose private data to unauthorized individuals.

### **3) PROCESS AUTOMATION FOR HEALTHCARE PROFESSIONALS**

Healthcare professionals' days are packed from start to finish, and a common complaint among them is the extent to which administrative tasks eat into precious time with patients. Generative AI can help pharmaceutical companies be a good partner to HCPs by automating tasks such as patient enrollment, prior

authorization, and even answering frequently asked questions (FAQs)—though it all needs human supervision, especially the FAQ responses, each of which a qualified person should review before hitting send.

## Guidelines to follow when implementing generative AI

Even in these use cases, which avoid direct exposure to customers and HCPs, pharmaceutical companies need to follow guidelines to keep their application of generative AI ethical, safe, and current. Here are a few of the most critical recommendations:

- **Monitor AI-generated results closely:** Whatever generative AI use cases a pharmaceutical company decides to implement, they must regularly monitor AI-generated content for quality, legality, and compliance. It's important not to become complacent. Just because all the content for the first few weeks passed muster, that doesn't mean the AI won't produce noncompliant content or even outright nonsense in the future.
- **Continuously improve the AI model:** It's also important to update and improve the AI model regularly to respond to user feedback, changing requirements, and, especially, advancements in AI. Technology never stands still, and that goes double for generative AI. Dario Amodei, who led the OpenAI team that created GPT-2 and later co-founded the AI firm Anthropic, likes to talk about scaling laws, which project how generative AI improves exponentially as it trains on more data. The upshot is that AI capabilities are advancing much faster than most people realize. As Ezra Klein said in the preface to his April 2024 interview with Amodei, "Amodei believes we're just getting started, that we're just hitting the steep part of the curve now. He thinks the kinds of systems we've imagined in sci-fi, they're coming not in 20 or 40 years, not in 10 or 15 years, they're coming in two to five years."
- **Have a plan to mitigate AI crises:** Consider and develop strategies for how your AI will handle edge cases or unexpected input. It's crucial to put guardrails in place so the AI doesn't just start riffing when it doesn't have enough information to provide a grounded answer to an edge case or inappropriate question and so it knows how to respond appropriately to inappropriate prompts. And, should the worst occur and AI-generated content goes awry, you'll want a crisis management plan already in place to rectify the situation.

Implementing generative AI in pharmaceuticals requires thought, not automation—and while powerful, it should not be used in an automated way for patient or HCP-facing use cases. However, generative AI can still be used internally—with supervision, planning, and guardrails—to improve efficiency and accuracy.



# CHAPTER 6

## Why you need a design and UX-forward mindset to achieve your digital goals

Each year, pharmaceutical companies invest billions of dollars and countless hours of creative and execution time on digital advertising. A significant portion of this effort is focused on leveraging digital tools and channels to capture the attention of healthcare professionals.

Strategic marketing campaigns can create personalized interactions that deliver valuable information to HCPs. When done effectively, a campaign drives the right people to the right places, directing HCPs to the most relevant information.

While you understand that these campaigns are a critical component to engaging with HCPs, you may find yourself asking things like:

- Are there things outside of our marketing efforts that can help improve the HCP experience?
- Is it possible to make our digital marketing campaigns feel cohesive with the rest of our HCP experience?
- Can I maximize my marketing dollars by getting HCPs to stay on our website that our ads are driving them to?

With an intentionally designed user experience, you can provide a meaningful, relevant, and positive digital experience for HCPs, even in the highly regulated environment of pharmaceuticals.

Thoughtful UX is the thread that pulls all of the concepts we discuss in this ebook together—it eliminates design distractions, incorporates HCP feedback, creates consistency across digital touchpoints, and delivers a personalized experience to HCPs. It also includes new technologies such as AI and generative AI in a well-considered manner. It incorporates rigorous research on the needs and desires of the company's audience, and then uses these findings to direct the UX design. If you want to explore more, read about [why UX is essential for a successful pharma marketing strategy](#).





Building a digital-forward strategy in the pharmaceutical industry has its challenges, but there's a proven path to overcoming them. Think Company's design experts have worked with some of the world's largest pharmaceutical companies to build and execute digital strategies just like this—and we've seen engagement with HCPs increase significantly, trust in brands' integrity and safety improve, and successful omnichannel strategies come to life. We can help you build a path to success, too. **Reach out to get started!**

