



POINT OF VIEW

Getting Started With Personalization



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Across the industry, pharma and biotech manufacturers are locking in big investments for enterprise technology platforms to make data-driven marketing a core part of their businesses. Personalization is a key feature of these platforms, promising to transform the brand ecosystem into an “engine” for delivering tailored experiences at scale to every physician, patient, and caregiver.

But when the sale closes and vendors walk away, it often becomes the brand marketer’s job to figure out how to actually achieve personalization’s lofty promises.

For many brands, simply getting started can be half the battle. In this article, we’ve identified winning strategies to begin building personalization into your business over time—**even as a healthcare brand.**

The Case For Personalization Is Clear

Exhaustive cross-industry analysis by consulting giant McKinsey has proven the value of personalization, leading companies to:

- ◆ **Generate more revenue:** Personalization was responsible for delivering between 5% and 15% more direct revenue lift, depending on the industry.
- ◆ **Improve marketing efficiency:** Personalization has a proven multiplier effect across the marketing ecosystem, helping improve the efficiency of existing marketing expenditures up to 30%.
- ◆ **Meet changing customer expectations:** Personalization is increasingly becoming one of the most important factors ranked by customers driving initial brand choice, loyalty, and satisfaction.

However, sometimes the patient or physician experience is “just different.” The question then becomes: how do we make strategic decisions and investments that ensure personalization is a true value driver over the status quo, and not just a marketing novelty?

Easing Into Personalization

If you’re feeling uncertain about where to begin, you’re not alone. Nearly two-thirds of digital marketers (63%) rank data-driven personalization as the single most difficult tactic to execute. **Along with the unique marketing challenges and privacy concerns in healthcare, the pressure to “get it right” becomes even more paramount.** Moreover, 84% believe the full potential of personalization has not yet been realized, **making success a moving target.**

Considering this, getting started can seem daunting—but it doesn’t have to be. Here are 3 simple recommendations on how to approach personalization differently—not as a discrete tactic, but instead, as a long-term ingredient rooted in your brand’s business needs.



Getting Started With Personalization

1. Solidify The Brand Blueprint At The Outset

Many brands never stop to build—or maintain—master strategic planning documents that holistically map brand platform, messaging, content, and ecosystem planning against customer needs. Streamline and revise your brand blueprint upfront to help take stock of gaps, insights, and opportunities before experience planning begins, and embrace a forward-looking view to plan strategic messaging evolution for the next 12, 24, and 36 months. Also consider refreshing customer research at this stage to check assumptions and gain new intelligence.

- ◆ **Why is this important?** The brand blueprint will become the backbone for architecting tailored customer experiences—in messaging, content, and driving desired actions. Centralized planning will help break down channel silos and unify strategic focus.

2. Determine Your Data Sources

Personalization requires having data readily available to indicate what components go into each customer's tailored experience. Will you make educated guesses using implicit data that you observe about your customers or will you collect explicit data directly from them to personalize their experiences? Do you own these data or will you need a partner to acquire, analyze, and manage these data for the brand?

- ◆ **Why is this important?** Identifying data sources helps define the boundaries for tailoring experiences of value to both the customer and brand. Planning through a data lens will help you prioritize and plan for scaling personalization strategies/tactics over time.

3. Prioritize Focus Areas Against Business Impact

Using your business as a barometer, evaluate where personalization will be most valuable. Consider questions such as: Do your brand's greatest challenges lie with HCPs, patients, or caregivers? Which segments within these groups are more influential and which might provide a greater opportunity for growth? What areas of the journey are most critical to meeting your strategic objectives, and what touchpoints for personalization align to those phases? Thinking through questions like these can help uncover quick tactical wins.

- ◆ **Why is this important?** Depending on how the brand ranks customer engagement gaps and assigns value potential, you may pursue markedly different strategies for designing personalized customer experiences over time.

Uncover Your Next Opportunity With Us

Evoke helps brands drive business results using our proprietary HUMANIZE™ methodology, shining a spotlight on the business and identifying the moments that matter most to their customers as people. Let's talk about where personalization can provide value for your brand.

The Evoke Center of Excellence on Personalization helps marketers approach the promises of marketing technology with clear, actionable, and human-centered solutions to tailored customer engagement. For more information, email us at business@evokegroup.com.

Sources

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