



IN PARTNERSHIP WITH



The Contradiction Conundrum

Essential reading for those looking
to lead the way in digital product
and customer experience design
in pharma and healthcare

In this report

- 3 Executive summary
- 4 Methodology

The Contradictions

- 5 **Digital best practice:**
Intention versus Execution
- 9 **Strategy essentials:**
Failure versus Success
- 14 **Customer centricity:**
Opinion versus Insight
- 18 **Mindset:**
Traditional versus
Purpose-driven
- 22 **User research:**
Physical products versus
Digital products

Graphite Perspectives

- 29 What do we mean by value?
- 31 Digital strategy across
markets
- 33 Processes: Design your
way to success
- 35 Exploring barriers to
user research
- 37 Digital pharma versus
big tech

- 39 Conclusion
- 40 About Graphite
- 41 About Reuters Events
- 41 Contributors

Executive summary

The rapid digital transformation in pharma in recent years has been nothing short of remarkable.

Decades worth of digital progress and innovation have been accomplished in just a few years, with organisations responding to changing customer demands and introducing new ways of working.

Health and pharma industries are booming, and on the precipice of huge disruption.

The Contradiction Conundrum report explores how pharma organisations are currently approaching their digital products, services and strategies, and the level of success they are experiencing. We asked 450 pharma and healthcare professionals around the world to share their views.

Our survey reveals a sector that is excited about the opportunities presented through digital product design. But despite this optimism regarding the possibilities, confidence in the ability to execute is mixed. This is highlighted through a number of key contradictions facing the pharma sector.

Themes covered within these contradictions are digital best practice and execution, fundamentals of a successful digital strategy, sources of insight for key decision-making, the role of organisational and individual mindsets, and the role of user research.

The pharma sector is not blind to the problems that exist around digital innovation.

A naturally risk-averse culture results in tools taking a long time to get to market, and when they do arrive, their purpose and impact are often lower than originally intended.

Ways of working need to evolve, particularly when it comes to customer centricity and the approach to building digital products that are a long term success.

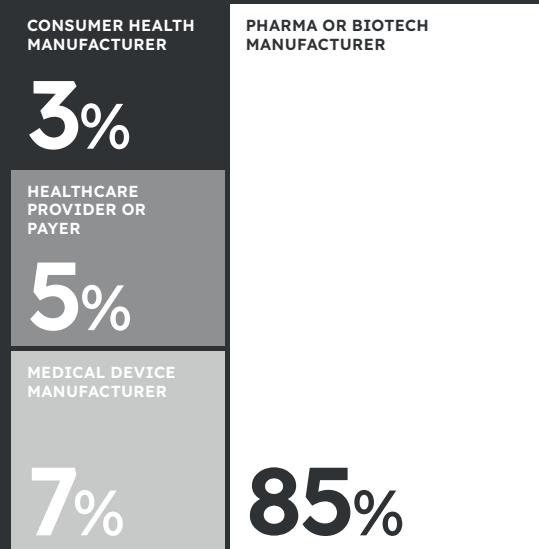
Drawing on the survey data, along with opinions from expert contributors and Graphite's own sector experience, we'll explore how, through deepening audience understanding and building the right internal processes, pharma teams can overcome any contradiction.



Methodology

The Contradiction Conundrum report is based on feedback from 450 professionals working at pharmaceutical and healthcare organisations worldwide.

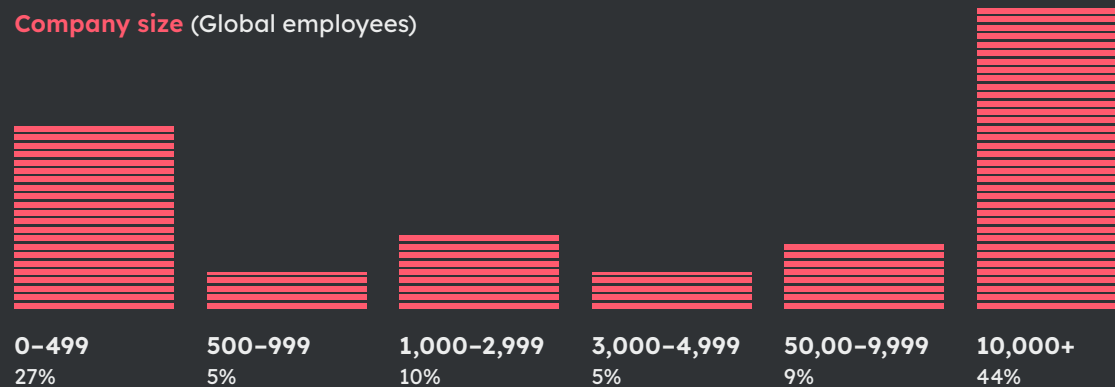
Sectors



Global representation (Regional remits across respondents)



Company size (Global employees)



Seniority (450 Respondents)

A range of seniority levels are represented from Manager to C-Suite.

Job functions



Intention versus Execution

It's no secret that pharma is behind the curve in comparison to other industries when it comes to its digital maturity.

Despite this, there is a good understanding of the value of digital products and services and the need to make them a future priority.

Although intention and awareness are high, our survey shows that current behaviour doesn't reflect this and digital product success rates are low across the sector.

**Digital best practice:
Intention versus Execution**

91%

Ninety-one percent agreed that 'pharma sponsored digital products can add value to the HCP and patient by supporting the overall customer experience'.

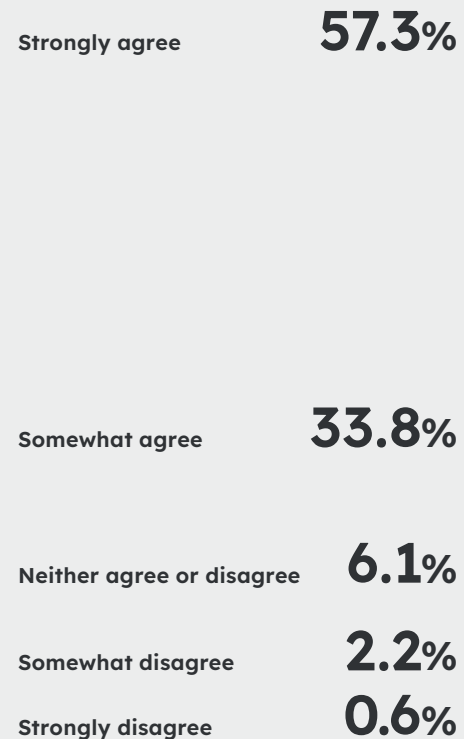
This is a clear indication that respondents see digital solutions playing a key role in their future audience engagement initiatives.

The value of digital is understood

There is also high awareness that a 'customer-first approach' is key to achieving impact. When asked which factors or changes will be most important in the next two years to enable their organisation to improve the success of their digital products, the top response by far (42%) was 'moving from a product-first to a customer-first mindset'.

Although this is recognised, making 'customer-first' a reality is a challenge and something talked about throughout this report.

Pharma sponsored digital products add value to the HCP and patient by supporting the overall customer experience



**Digital best practice:
Intention versus Execution**

4%

Only 4% of respondents said that their digital pharma product launches regularly succeed.

“I think people have the best of intentions and may want to change their behaviours, but they’re hampered by legacy, standard operating procedures and regulations.”

**MALCOLM FOGARTY — FOUNDER, NEXT AT GSK
CONSUMER HEALTHCARE (HALEON, MID-2022)**

Low digital maturity is a barrier

The inability to shift from intention to good behaviour is reflected in the results that pharma teams are currently experiencing, and this will continue if steps aren’t taken.

To some extent, this boils down to a lack of understanding of digital best practice and how to successfully execute on digital approaches. Of those who said they were having the lowest rates of success with their digital product launches, this was one of the most common issues cited:

“Lack of inhouse digital maturity”

“We still need to evolve further in our digital mindset”

“We’re just not experienced enough”

Only 22% of our participants said that ‘embracing UX best practice’ was an approach they used to ensure their digital offerings were built around customer needs.

Similarly, when asked which changes will be most important in the next two years in enabling their organisation to improve their digital product success ‘embracing user-centered design approaches’ (17%) and ‘increasing understanding of CX/UX across compliance and regulatory teams’ (14%) were the least selected.

Digital best practice: Intention versus Execution

More support needed for internal innovators

Another possible explanation for current low success rates is that those who do have more in-depth understanding of digital product best practice and the right ideas and initiatives, don't currently have the top tier organisational support to execute on them effectively.

We know that the C-Suite understand the value of digital – the highest rates of 'strongly agree' that digital pharma products can add value to audience relationships was amongst VP (66.7%) and Board Level (63.6%) respondents.

Senior product sponsors need to allow the time, budgets and space for those on the ground to modernise processes and to bring in experts so effective digital experiences can be created.

Although the pharma sector recognises the challenges it's facing around its digital solutions, the route to overcoming these barriers remain unclear for many.

“A lot of time and effort is put into ideation and build, all leading up to a big go-live but with little thought given to a sustainable strategy.

Pharma is often guilty of a launch and leave mentality and onto the next shiny thing.”

OMNICHANNEL LEAD — ONCOLOGY AT TOP 5 GLOBAL PHARMA ORGANISATION

PRACTICAL TAKEOUT

- 1**
Enhance internal understanding of digital best practice through training
- 2**
Do this across teams, stakeholders and partners so effort is not siloed
- 3**
Work with a team of experts with extensive regulatory knowledge

Failure

versus

Success

For digital product launches to be successful, they need to be born of a clear strategy.

Fundamental aspects of a digital product strategy are currently being overlooked within pharma, which is contributing to low overall success rates.

Our research points to a lack of planning and long-term outlook, as well as problems setting KPIs and measuring success.

Strategy essentials: Failure versus Success

The pharma sector is not blind to the problems that exist around digital strategy.

With the rush to get digital products to market the ‘why’ and measurement are often neglected.

A strategy relies on clear objectives and KPIs outlined in advance — only then can success — and failure — be measured.

Problems with setting KPIs and measuring success

Nineteen percent of respondents said that ‘measuring and tracking success’ would be the most important change/factor in improving the impact and success of their digital products.

The group by job level that felt this was most critical was Board Level or Business Owner (26.1%). This is understandably a high priority with senior leaders needing to justify investments in digital products.

Regionally, those with remits in North America were most likely to put measurement as the top factor (15.1%), perhaps indicative of the US pharma teams being slightly ahead of the curve when it comes to digital.

When it comes to the level of success that our participants were experiencing from their digital product launches, measurement was a key influencing factor at both ends of the scale.

“When they build the strategy at a company-wide level, they say you have to do digital because it’s important, but they don’t set the right markers for how to measure success.

What you measure is also so important.”

DIVYA YERRAGUNTLA – VICE PRESIDENT,
ASSET STRATEGY AT SYNEOS HEALTH

**Strategy essentials:
Failure versus Success**

DIGITAL PRODUCT SUCCESS RATES: VIEWS FROM RESPONDENTS

Lowest success rates

“We don’t know how to define success but we still expect a return often financial from such launches.”

“Can’t see the added value of these tools and objectively assess their impact on business.”

“We have no data — despite some people strongly advocating processes to collect and analyse them.”

Highest success rates

“We use specific parameters to measure the results.”

“We have KPIs to measure success, correct gaps & re-evaluate.”

“Data results show that the digital assets deliver the value, having high customer satisfaction and improved customer experience.”

10%

Ten percent of respondents said that they didn’t know the level of success of their digital product launches as they don’t measure anything.

Despite an understanding of the importance of measurement, it’s something that many digital pharma teams are currently struggling to effectively implement.

KPIs on customer satisfaction, behaviour and engagement will be unique to each business. But what is shared is the ability to make informed decisions and changes based on quantifiable evidence, which in turn will enhance digital product performance.

**Strategy essentials:
Failure versus Success**

80%

Eighty percent of respondents agreed that pharma gets too distracted building websites and apps but doesn't follow through on creating services that provide long-term engagement for HCPs and patients

A short-term outlook and lack of planning

There's also an awareness of issues with long-term outlook and engagement. Those experiencing low levels of digital product launch success cited key reasons why, including — a lack of long-term vision and commitment; poor planning; internal silo mentality.

Pharma teams often work by a project, rather than a product approach. Delivering projects is not the issue; lack of follow through and long-term outlook however is.

A digital product shouldn't be thought of as having a beginning, middle and end in the same way as a one-off project. Educating stakeholders, managing expectations and creating a shared understanding of the benefits of MVP are needed.

Crucially, perceptions of 'failure' and 'success' need to evolve in order to enable real digital progress in pharma.

“To embrace working with digital products, which are innovative and add value to patients or customers, they need to be viewed as a long-term investment.

A digital product will have greater value and longevity if the time is taken to find the correct path, which often is found after taking a few wrong turns.”

**NISA KHAN — REGIONAL MEDICAL AFFAIRS
MANAGER, UK & IRELAND AT CSL BEHRING UK**

Strategy essentials: Failure versus Success

Building long-term engagement

When it comes to building and maintaining long-term engagement, of those whose launches **always** or **often** achieve the expected results, 'improved customer service' and 'improved customer relationships' were given as the top benefits.

It's important that 'value-add' tools are given the consideration they deserve.

If a digital product fails, there may not be major consequences for the team driving the project, but it's important to remember the impact and impression left on customers from a poor digital experience.

“If you work on a product, there’s an understanding that there’s going to be iterations and it continues to improve over time.

When you make a product, but see it as a project, people think ‘now that we’ve launched, the project is over.’”

DR GYLES MORRISON — DIRECTOR AND CLINICAL UX STRATEGIST
AT CLINICAL UX ASSOCIATION

PRACTICAL TAKEOUT

- 1**
Ensure your strategy has a purpose, goals, KPIs and success metrics
- 2**
Have the right people involved from the get-go so a joined up effort
- 3**
Follow through — the launch of your digital product is just the start

Opinion

When determining the core aspects of a digital product, audiences and their specific needs should be the first consideration.

versus

Insight

The insights gathered can then be converted into actionable, practical solutions to inform digital design decisions.

Our research shows that pharma teams are currently relying too heavily on internal expertise and opinion.

Customer centricity: Opinion versus Insight

We asked our survey participants what processes their organisation uses to ensure their digital offerings are built around customer needs. Approaches that involved speaking with customers first-hand, such as regular research or collaborative workshops were the least selected options:

- 1 Stakeholder expertise
- 2 Monitoring digital marketing trends
- 3 Competitor analysis
- 4 Collaborating with third parties
- 5 Interactive workshops
- 6 Regular ongoing user research

DIFFERENCES IN APPROACH

Across roles

Those in Commercial Strategy, Commercial Launch and Digital roles tended to favour approaches such as monitoring trends and stakeholder expertise more than those in Medical Affairs or HEOR/RWE roles — two remits that are traditionally more reliant on first-hand research.

By company size

Respondents in medium sized companies 5,000–9,999 relied more on stakeholder expertise and less on user research than companies 10,000+, where the trend was the other way round.

This may reflect the more limited resources of comparatively smaller organisations, where internal or low cost information sources are utilised often.

Customer centricity: Opinion versus Insight

“So many companies have been successful without following a proper design process and without doing good user experience.

Others think that they can repeat this. They were lucky, but they wouldn't have been if there was better regulation and a higher precedent for what 'good' looks like in digital health.”

DR GYLES MORRISON — DIRECTOR AND CLINICAL UX STRATEGIST AT THE CLINICAL UX ASSOCIATION

Leaving customers out of the conversation

Customers are being left out of the conversation about their needs and preferences when it comes to digital products, with pharma organisations relying heavily on internal expertise or sector comparison to make key decisions about design and development.

This doesn't devalue input from internal teams, but with customer needs changing rapidly, views and learnings based on previous experiences can become quickly out of date.

“These are minimum actions to find solutions that are palatable internally — ‘a competitor is doing this’ or the ‘trends are pointing us to these types of solutions’ and my team or enough internal stakeholders agree.

These are not truly strategies.

These are easy arguments to make without requiring due diligence.”

GARY HOLIFIELD — DIRECTOR OF DIGITAL STRATEGY AT AMRYT PHARMA

Customer centricity: Opinion versus Insight

Competitor comparison carries risks

There are also dangers in making comparisons with competitors.

What works for one organisation won't necessarily work for another and from the outside, it's hard to tell how successful a competitor has really been in their digital endeavours.

There are huge opportunities for pharma organisations to look outside of the sector and learn from other industries where an established and refined approach to understanding customer needs has already been established.

Adapting processes to account for increasingly empowered customers

As customers, particularly patients, become increasingly informed and empowered, pharma will need to look for external inspiration to keep up with their expectations.

It's crucial to utilise a combination of information sources to inform product decisions — looking at existing data, speaking to stakeholders and internal experts, looking at competitors and sector trends and, crucially, speaking to your customers themselves.

“We all want to be unique. How can you be unique if you keep looking back to what others have done?”

That only happens if you have your own insights — not what somebody thinks might work because it worked for five others.

Every time we have sought our own insights, we have seen success.”

DIVYA YERRAGUNTLA — VICE PRESIDENT, ASSET STRATEGY AT SYNEOS HEALTH

PRACTICAL TAKEOUT

- 1**
Speak to customers and refine your approach to focus on their unmet needs
- 2**
Treat this as part of an ongoing process to inform better decisions
- 3**
Educate teams on the value of data — both quantitative and qualitative

Traditional versus Purpose-driven

Ways of thinking and working are deeply ingrained across pharma and for decades there's been little change.

That is until now.

There are signs that some pharma professionals are adopting a more purpose-driven, customer-first mindset when it comes to digital, but there is still work to be done across the sector as a whole.

Mindset:
Traditional versus Purpose-driven

Moving from a product-first to a customer-first mindset will be the biggest influencing factor in allowing pharma organisations to improve the impact and success of their digital products in the next two years — 42% agreed.

Mindset and culture

Attitudes and perceptions need to change as they are blocking progress.

This is particularly true when it comes to user research and customer-centricity, but also as a result of internal structures and silo mentality, where personal agendas, rather than looking at the overall picture, are limiting progression.

Our research highlighted significant differences in mindset across job remits.

Medical Affairs teams

The adoption of a more purpose-driven mindset seems to be most prevalent amongst Medical Affairs respondents, with 65% strongly agreeing that 'direct marketing to HCPs has run its course'.

“To bring about a mindset shift, it needs senior level executive support and expectation; training on digital as some concepts are not fully understood; and digital KPIs that are less about ROI and more about being a digital culture. These are potential pivot points.”

GARY HOLIFIELD — DIRECTOR OF DIGITAL STRATEGY AT AMRYT PHARMA

Mindset:

Traditional versus Purpose-driven

This is not unexpected. Medical Affairs professionals are predominantly on the front line and closer to customers — with many even having a background as practicing HCPs.

They have an understanding that customer engagement methods needs to change and there's a fatigue amongst HCPs, who want more tailored, valuable and meaningful approaches.

Commercial teams

However, many teams still maintain a more traditional mindset. Only 28.6% of respondents in Commercial roles strongly agreed that 'pharma sponsored digital products can add value to the HCP and patient experience'.

“Commercial teams working in collaboration with Medical Affairs early in the process is essential to deliver a digital solution which is more patient- or customer-centric.

It will help unlock the patient or customer-focus and optimise the value of the end product for the user.

It also applies to measuring outputs; if the outputs are customer-centric it will help shift the current mindset and improve digital product success.”

**NISA KHAN — REGIONAL MEDICAL AFFAIRS
MANAGER, UK & IRELAND AT CSL BEHRING UK**

These teams are typically under enormous pressure to deliver results so 'tried and tested' might feel like the safest approach.

In order for the mindsets of individuals and teams to change, the organisational mindset and culture first needs to change at the highest level. To enable digital transformation and innovation, pharma needs to structure objectives in a way that enable teams to have the freedom to think and do differently.

An objective set around improved digital engagement, rather than 'box-ticking' in terms of digital output, would help here.

“Are we letting people take risks? Without having failures, you never succeed completely.

Having those failures along the way is a good thing, but the company culture needs to promote that in order to enable digital innovation.”

**DIVYA YERRAGUNTLA — VICE PRESIDENT,
ASSET STRATEGY AT SYNEOS HEALTH**

Mindset:
Traditional versus Purpose-driven

Modernising the HCP-rep relationship

Another necessary shift highlighted is modernising the role and mindset of the rep.

Fourteen percent of respondents said ‘changing our reps’ mindset from sales to customer success’ was their biggest challenge in the next two years. Organisations with 5,000+ employees felt this the most (53%).

By utilising digital tools to take over administrative, day-to-day tasks, pharma organisations can free up their reps time and enable them to take on the high quality, high value interactions with HCPs.

This will help evolve the role and add more depth to the relationships.

The danger of sticking to the ways things have always been done is being out of touch with HCPs and patients, whose demands and needs are always evolving.

Not moving ahead, could mean being left behind.

“There’s a real opportunity for customer-facing colleagues to own and deliver customer centricity across an organisation.

They are the organisation’s eyes and ears and have the opportunity to live the customer-first mindset — aligning the organisation’s goals with those of the customer.”

OMNICHANNEL LEAD — ONCOLOGY AT TOP 5 GLOBAL PHARMA ORGANISATION

PRACTICAL TAKEOUT

- 1**
Ensure you have internal alignment on new thinking and ways of working
- 2**
Manage change thoughtfully — don’t forget the emotions involved
- 3**
Clear communication on the benefits of a purpose-driven approach

Physical

versus

Digital products

Pharma organisations would never launch a new treatment or device without conducting extensive user research and testing.

But the approach is very different when it comes to digital products and services.

Our data shows that firsthand research with patients or HCPs is often completely overlooked, or deemed low priority.

User research:
Physical product versus Digital product

85%

Eighty-five percent agreed that 'only pharma companies that invest in digital customer experience and talk to their customers regularly will be able to differentiate themselves and add value to their customers through digital now and in the future.'

Amongst participants in consumer healthcare roles, 100% strongly agreed. This implies that consumer-led attitudes are already well established within this sector. Despite understanding the necessity of speaking regularly with customers for long-term engagement and success, the prevalence of user research around digital products and services within pharma is currently very low.



1 in 5 respondents said that their organisation never conducts user research in regards to their digital products or services.

**User research:
Physical product versus Digital product**

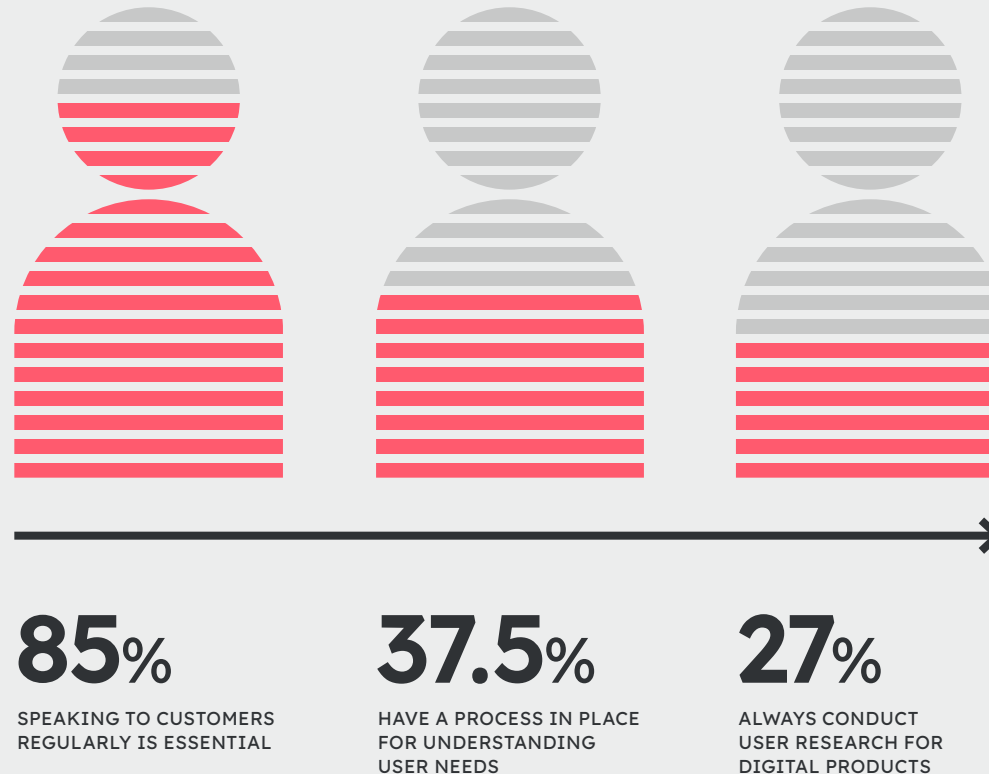
**Firsthand user insight
is being overlooked**

Thirty-seven point five percent said they 'have a process in place for understanding their user needs'.

But despite this, few organisations are speaking to their customers regularly about their needs and preferences when it comes to digital products.

Only 27% said that their organisation 'always' conducts user research in regards to their digital products or services.

An additional 35% stated that they have only conducted user research for these purposes once or twice.



“What you’d call a user-centred, human-centred or people-centred design process is rarely followed in pharma.

They are aware of having to do huge amounts of qualitative and quantitative research when they are doing drug development, but this is very rarely applied to digital product design.”

DR GYLES MORRISON — DIRECTOR AND CLINICAL UX STRATEGIST AT THE CLINICAL UX ASSOCIATION

**User research:
Physical product versus Digital product**

“Pharma companies’ digital product streams aren’t reliant on being self-sufficient financially, nor robust in terms of individual digital product ROI.

They are not as mature when it comes to funding models and UX Research across each cross functional product team — it’s seen as a luxury, not a necessity.”

**HEAD OF USER EXPERIENCE AND DESIGN
AT TOP 20 GLOBAL PHARMA ORGANISATION**

- 1 Lack of understanding of the process and its value
- 2 The cost is too high, or perceived as being too high
- 3 It’s difficult to access our users (patients or HCPs)
- 4 It’s difficult to gain internal buy-in and evidence the value
- 5 Lack of experience converting user research into action
- 6 There are too many stakeholders to engage
- 7 We don’t have the time/resources
- 8 Lack of experience conducting user research
- 9 User research is not signed off by regulatory teams

The top challenges to user research that pharma organisations are facing

For pharma organisations to embrace user research as a tool for improving the quality and long-term success of their digital products, it’s essential that understanding of it’s value and process is enhanced across organisations — at all levels and functions.

User research:

Physical product versus Digital product

The top barriers to user research are interlinked

There are strong links between the barriers to user research that pharma organisations are facing.

If the value was better understood, budget, time and resource could be allocated to avoid failed product launches. This links back to being clear on the purpose of the product and the measurement/KPIs.

Education is also needed around current UX research processes to dispel the myth that it has to be expensive, time consuming and difficult to get regulatory approval.

The scope of user research investigations can be adjusted to fit specific timelines and budgets.

Start small if you need to. Some user research is better than none at all, and the benefits will soon be realised.

“With any innovation, it can be difficult knowing how to deliver your vision, and activities involving patients and their experience requires extra care and caution.

This can be challenging to navigate, and requires teams to stop and think whilst working in a fast-paced environment where **tried and tested activities are favoured.**”

NISA KHAN — REGIONAL MEDICAL AFFAIRS MANAGER,
UK & IRELAND AT CSL BEHRING UK

PRACTICAL TAKEOUT

- 1**
Enhance understanding of the value of user research across your organisation
- 2**
Seek to overcome perceptions of user research as expensive, time-consuming, and difficult to approve
- 3**
Before launching or revamping your digital product, make time for user research with patients or HCPs to improve chances of long-term success

User research:

Prevalence of user research across markets

We asked our survey participants about the level of user research they have conducted in regards to their digital products and services.

Based on their regional remit, this shows where digital user research is always taking place.

19.1%

RESPONDENTS WITH
A GLOBAL REMIT



7.2%
EUROPE

20.8%
NORTH AMERICA
INC. MEXICO

9.9%
ASIA-PACIFIC

8.3%
MIDDLE EAST

11.1%
AFRICA

Graphite Perspectives



What do we mean by value?



Rob Verheul
CEO

Value is a term that's used a lot and means different things to different people.

We asked Graphite's CEO, Rob Verheul, what 'value' means when it comes to digital products and services and why there might be a need for further clarification.

The perception and realisation of value is dependent on the context and needs of the individual — a health care practitioner or patient — or organisation at that moment in time.

A digital product, such as an app or website, is often valuable to an individual due to its functionality. The individual might want information to help them manage a condition, or access to a community of people to help them.

Often there's a very human need to be met, which can be emotional, such as worry, or physical, such as pain.

The requirements are always different for HCPs and patients, but they often intersect.

The data a patient consumes or creates when using the digital product can help HCPs understand more about their condition and the effectiveness of their treatment.

For both, a joined up digital experience might be the most valuable thing; saving time and stress.

Digital products create value on an organisational level in terms of business efficiency and improved relationships with end users.

Graphite Perspectives

There's also the data — particularly when the user population is a large one — which can be used to understand effectiveness, compliance and side-effects, to name a few.

It's often difficult for individuals to convey what is important to them, as everyone brings a different perspective gained from their role or life experience.

Often a useful method is storytelling. It's a fundamental part of being human and client case studies lets us share information and communicate perspectives in a way that creates an emotional connection and demonstrates value.

It's our job to ensure our clients and their teams have a shared understanding of the multi-faceted value add of effective digital products and services.

It must start with an alignment on the 'why' and on KPIs so that value can be measured in an objective way.

92%

92% of our respondents agree that pharma sponsored digital products can add value to the HCP and patient by supporting the overall customer experience.

Nisa Khan, Regional Medical Affairs Manager at CSL Behring UK, explains how her team are reimagining value:

85%

85% of respondents agree that only pharma companies that invest in digital customer experience and talk to their customers regularly will be able to differentiate themselves and add value to their customers through digital now and in the future.

“We are co-designing our digital product with the end user and success will be defined as the value to the end user, which is different to current approaches where the end-user is not involved in co-design and success is defined as building the product.”

Digital strategy across markets



Jon Hume
Commercial Director

Why are there regional differences of opinion?

Graphite's Commercial Director, Jon Hume, shares his views on the key considerations for pharma organisations when rolling out their digital products and strategies across markets, and why regional nuances need to be accounted for.

Those with remits in the Middle East (41%), and South/Central America (40%) agreed less than those in North America (60%) and Europe (58%) that 'pharma sponsored digital products can add value to the HCP and patient by supporting the overall customer experience'.

Throughout the report, we identified regional differences of opinion around topics like the perceived value of pharma-sponsored digital products for HCPs and patients, and the evolving HCP-rep relationship.

Generally, those in established markets such as Europe and North America embraced digital products and strategies more than those in emerging markets for pharma such as the Middle East and South/Central America, where there was more scepticism.

When rolling out digital strategies across markets, it's important for pharma organisations to keep these differences front of mind.

Tailoring the approach to be relevant to each market is essential – a one-size fits all approach runs the risk of creating push back from local colleagues that can cause delays or even total failure for globally sponsored launches.

Graphite Perspectives

In pharma, there can be a tendency to simply replicate what was done earlier in already established markets when rolling out digital solutions into new ones.

This may not always be appropriate. It's important to take the time to understand unique local needs, norms and digital infrastructures.

Although digital uptake in some emerging markets began later, it caught up fast, with some markets skipping the desktop phase entirely and moving straight to mobile.

If you're rolling out a new HCP portal in these markets, ensure your designs are created mobile-first and your content is tailored appropriately.

There are also different cultural factors that need to be considered.

Patients and HCPs will have different preferences around how they will want to be contacted and by who.

One of our survey respondents who said they were currently experiencing low digital product success rates commented "Cultural shift is a key barrier in the Middle East, in addition to the lack of infrastructure for HCP interaction digitally."

Providing a flexible digital service that can respond to these needs will be more effective.

"Cultural shift is a key barrier in the Middle East, in addition to the lack of infrastructure for HCP interaction digitally."

SURVEY RESPONDENT

A final factor to consider is that digital colleagues may be spread more thinly in less-established markets, with wider remits and responsibilities and less support from experts.

Launch processes may need to be adapted to account for this, with toolkit based documentation used to create a simple path to getting an MVP online that can then be improved later based on analytics, feedback from the market and customer research.

The beauty of digital is that it gives you the agility to tailor your approach when you scale and expand across markets to ensure effectiveness, without the need to start from scratch.

Processes: Design your way to success



Joanne Reid
Delivery Director

When launching a physical product, pharma organisations follow tight and repeated processes but the same rigour is not always applied when it comes to digital product launches.

Graphite's Delivery Director, Joanne Reid, shares her views.

Many organisations, by their own admission, don't have digital processes in place. Some, however, have processes but they are not always followed.

There are a number of reasons why.

Often pharma organisations work to a different life cycle, or they are not structured in a way to support individuals or teams to work in more agile, iterative ways and to follow through post-launch. Or, there is a lack of knowledge or confidence.

To avoid corners being cut and stages in the digital life cycle being compromised, a mutual respect and understanding is required. Transparency, topped with training and working with people with the right skill set, are key.

With big pharma organisations specifically, there are often many Project Managers and Product Owners coupled with several different processes.

From our firsthand experience, there is a lack of access to the bigger picture.

Delivery teams are often involved too late leading to projects or features being executed out of necessity rather than to enable innovation.

In these cases, communication and collaboration within those teams outside project management should be seeking an 'overarching' digital strategy within the organisation. This will enable integrated teams or multiple agencies to work together across a 6 to 12 month viewpoint (or 'roadmap') and then define on a more granular level how to achieve this together.

Processes are there for a reason. It's not about creating unnecessary complexity but having simple and crucial steps to provide focus, direction and to help measure the success of digital product launches.

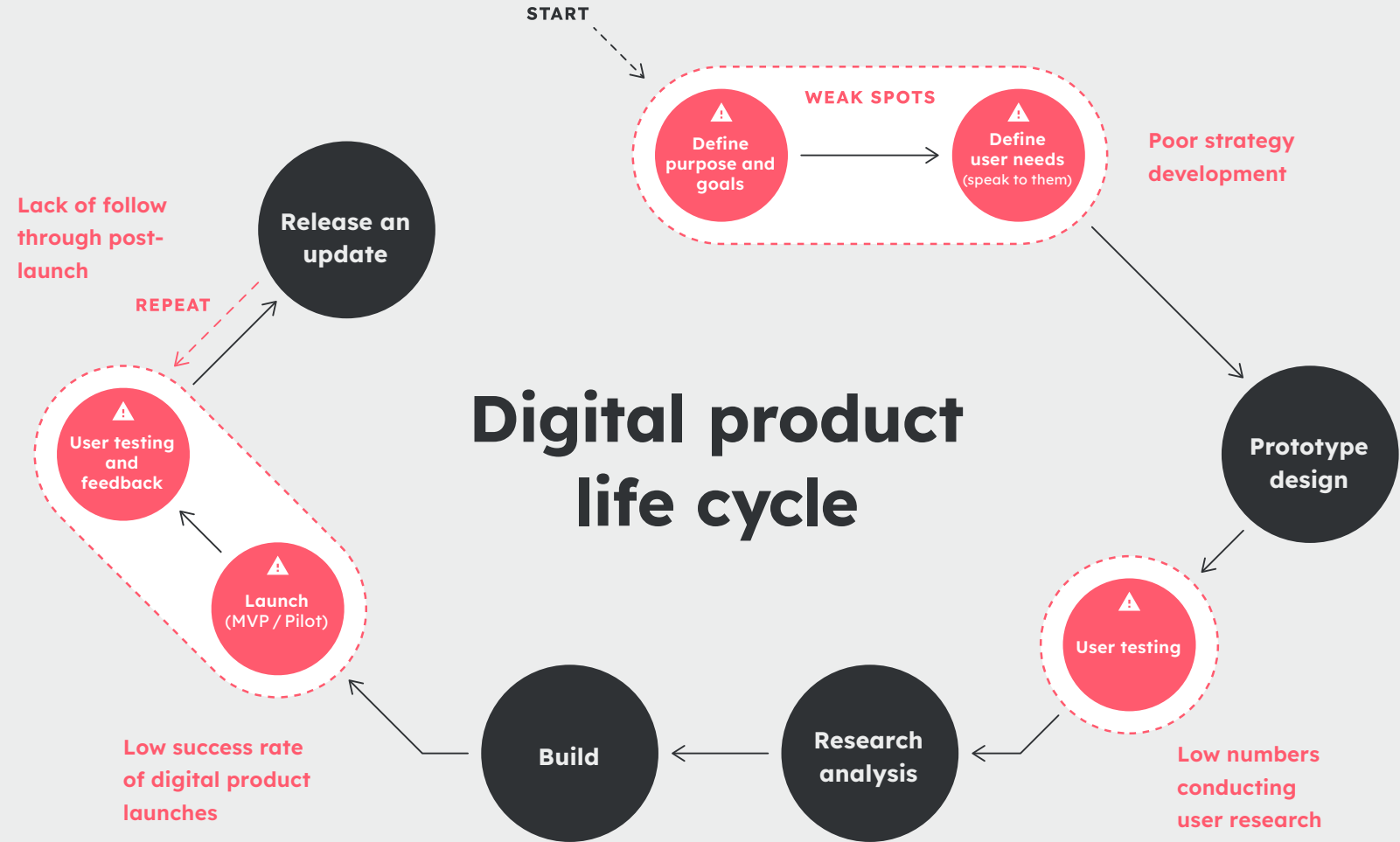
Graphite Perspectives

We've identified some potential weak spots in the typical digital product design process based on the contradictions identified. Pharma teams should pay particular attention to these steps in the process.

“One of the things that’s been proven in healthcare is that if you have the right process, regardless of mindset, you can still have repeatable output.”

DR GYLES MORRISON — DIRECTOR AND CLINICAL UX STRATEGIST AT THE CLINICAL UX ASSOCIATION

⚠ WEAK SPOTS
Stages in the life cycle impacted by the ‘contradictions’



Exploring barriers to user research



Jack Burton
Clinical UX Researcher

Design research should be a core pillar of any design process, for any product, across any sector.

Jack Burton, Clinical UX Researcher at Graphite gives his take on the key factors that are preventing pharma teams from utilising high quality user research when it comes to the design of their digital products and services.

Design research is the guiding light which gives confidence to product teams that their designs will be valuable to end users viscerally, behaviourally and reflectively.

Most importantly, it helps ensure digital products are aligned to core user needs and will help them to accomplish defined goals — a significant predictor of overall product success and ROI.

The findings within this report point to an under-utilisation of quality design research in the digital pharma sector.

So, why is this the case? There are three key factors that prevent impactful design research from taking place in digital pharma teams: lack of experience, lack of expertise, and lack of stakeholder buy-in.

Lack of experience

The pharma sector is still navigating an era of accelerated digital transformation.

Many organisations are attempting to harness digital to improve payer relationships and diversify revenue streams with new products to protect or capture market share.

However, the knowledge and skills required to operate successfully in the digital design landscape don't yet seem to have accelerated at the same pace as organisational goals and ambitions.

Many organisations have assembled digital teams with little-to-no experience or track record of creating successful digital solutions who often overlook seeking firsthand user evidence and insight as part of the design process.

Lack of expertise

There's also a lack of expertise within many pharma organisations to actually carry out effective user research.

High-quality, impactful user research in the digital health domain requires in-depth knowledge and application of concepts in clinical UX, psychology, and behavioural science.

The digital pharma space has been slow to acknowledge the required skill sets compared to counterpart teams in other sectors, and therefore largely does not yet have the in-house talent required to conduct the work.

4%

Only 4% of digital product launches in pharma regularly succeed

27%

Only 27% of organisations always conduct user research in regard to their digital products and services

Lack of stakeholder buy-in

Lastly, it may be difficult to receive buy-in from senior stakeholders in pharma to conduct meaningful design research work. It's likely to be poorly understood or acknowledged outside of product teams, and it can be difficult to prove the ROI of user research upfront.

Stakeholders that are used to waterfall, pipelined R&D processes for drug development may struggle to see why similar processes don't work with digital solutions.

This in itself is usually an uphill battle for any digital product team looking to introduce research into their process.

When it comes to digital experience, pharma is trailing behind; a widespread underutilisation of effective design research is denying patients and clinicians the optimal experiences they deserve.

It's our duty to continually strive to create true value through research-driven, evidence-based, and user-centric design in the digital pharma sector.

Digital pharma versus big tech



Thomas Michalak
Creative Director

Who should pharma be comparing their digital products to?

Graphite's Creative Director, Thomas Michalak, shares his views on whether it's fair to compare digital experiences and products within pharma to those of big tech innovators.

Is it fair to compare?

It's not a simple comparison. It is fair to expect the same level of quality and efficiency when designing digital healthcare products. But, it's unfair to compare yourself with organisations that operate with a completely different set of rules.

Learn from their early days, copy their mindset

Leading big tech organisations took years to disrupt their industry, going through many setbacks and mistakes but also making risky investments. Some got into it by choice, while some almost by chance.

When Glitch, an online video game didn't achieve the expected success, the team decide to focus on their homemade internal chat tool and made it public. Slack was born.

“Netflix has nothing holding them back. They can do anything and everything.

They have resources at their disposal...

They're all technology companies so trying to compare yourself with somebody whose main job is technology is I think not fair to pharma.”

DIVYA YERRAGUNTLA — VICE PRESIDENT,
ASSET STRATEGY AT SYNEOS HEALTH

Understand what you're working with: pharma has its own set of limitations.

Let's be realistic. Pharma has limitations and isn't the fastest sector. A digital product strategy is nothing if you are not taking your available resources and obstacles into consideration.

Regulatory constraints are a prime example.

Some of these tech innovators were not as constrained by regulatory limitations as within pharma and healthcare. But again, this didn't stop fintech from booming and innovating within a regulated industry that, historically, never considered user needs.

Excellence will come at a cost — hiring the right talent, investing in user research, shaking up processes, and a heavy dose of internal influencing. It is possible, but we can all agree it won't be easy.

“I disagree that it's impossible to develop similar UI and even capability.

I think the bar needs to be set as high as industry leaders. Setting your long-term goals and values to anything less is putting your company at a competitive disadvantage whether today or tomorrow.”

GARY HOLIFIELD — DIRECTOR OF DIGITAL STRATEGY AT AMRYT PHARMA

It's unrealistic to compare the digital experience of pharma's customers, with those of consumers of companies like Netflix, Spotify, Amazon etc.'

62%

62% agreed or strongly agreed

27%

27% disagreed, strongly disagreed or didn't know

Innovate or die

Your target audience doesn't care about your limitations — they will expect great UX.

Patients and HCPs are people too and they will engage with the same digital services as us on a daily basis, expect the same high standards across all.

The quality of digital pharma products needs to be high to retain their attention or in a couple of taps, they will be with the competition.

It's only a matter of time before patients and HCPs have more choice, even on products that right now, have little competition.

None of us have time to figure out or battle a bad user interface, so imagine how someone already managing health issues or a high stress job will feel.

There is too much competition, innovation, great content and options out there for you to risk all your hard work because of a poor user experience.

Conclusion

The next phase of digital evolution in pharma and healthcare will be just as dynamic and competitive as the last.

If you want to lead the way, you'll need to work to overcome any contradiction that is present in your organisation and limiting progress.

It is clear from our research that organisations have a clear view of the opportunities to be reaped from enhanced digital capabilities.

Those with the right focus, that can find the balance between what is best for them and best for their customers, and the agility to respond fastest will come out ahead of their peers.

This is evident from the improved customer relationships that those already experiencing success from their digital products are seeing.

Barriers to digital transformation in pharma and healthcare can be overcome with proactive and forward thinking approaches.

Ensuring comprehensive digital strategies with clearly defined success metrics are in place will provide focus and enable continuous learning and improvement.

There is also work to be done on building understanding of digital best practices and putting the right processes in place to support innovation.

Finally, adopting a customer-first mindset and seeking regular firsthand insights from HCPs and patients will be crucial.

By elevating their digital products and services, pharma teams have a unique chance to differentiate themselves, improve engagement and add value to their customer relationships.

Have you done enough to ensure your digital product launches deliver?



About Graphite



We are a digital customer experience agency that collaborates with healthcare and pharmaceutical organisations to deepen customer connection through meaningful digital experiences.

We combine digital expertise with extensive sector knowledge and understanding.

Innovation and creativity always come first, but not at the cost of regulatory approval.

Our dedicated teams bring strategic and design expertise to help clients turn ideas into effective digital products and experiences that are scalable and resonate with their patients or HCPs.

We conduct research, then convert this into actionable insight and practical solutions.

Our iterative approach allows us to quickly solve problems and implement change.

We're a company of individual specialists with a shared vision, ethos and approach.

With our clients, their teams across markets, and their partners, we've improved the digital experiences for millions of users.

Our services

**Customer Experience Strategy
User Research
UX and UI Design**

Trusted by



CSL Behring



Get in touch

If you have the ambition to do exceptional things, we're here.

Get in touch to tell us more about your plans, goals, or challenges to see how we can work together.

contact@graphitedigital.com

graphitedigital.com

graphite-digital

wearegraphite

wearegraphite

About this report — Survey conducted in partnership with Reuters Pharma Events



About Reuters Events

The pharmaceutical division at Reuters Events exists 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.

Disclaimer

The survey data referenced in this paper was sourced by Reuters Pharma Events on behalf of Graphite Digital.

The final report was compiled and written solely by Graphite, and the information and opinions within reflect that.

Graphite would like to thank Reuters Events for their sponsorship and primary research efforts that went into gathering the data to make this report possible.

Contributors

We would like to thank the following contributors for sharing their time and insights for this report.

All views are those of the individual, not the organisation.

Malcolm Fogarty

Founder, NEXT at GSK Consumer Healthcare (Haleon, mid-2022)

Gary Holifield

Director of Digital Strategy at Amryt Pharma

Nisa Khan

Regional Medical Affairs Manager, UK & Ireland at CSL Behring UK

Dr Gyles Morrison

Director and Clinical UX Strategist at The Clinical UX Association

Divya Yerraguntla

Vice President: Asset Strategy at Syneos Health

Head of User Experience and Design at Top 20 global pharma organisation

Omnichannel Lead, Oncology at Top 5 global pharma organisation



IN PARTNERSHIP WITH



Thank you

For more information please get in touch:
contact@graphitedigital.com

graphitedigital.com