

**Deloitte.**



Customer experience design:  
From selling to serving

**Integrating marketing, engagement, and  
services into patient support programs**

# Contents

Introduction	3
Decisions are driven primarily by emotions	4
Tapping into the emotional aspects of human behavior: Brands that do it well	5
Judging a brand by the experience	6
Contacts	7

# Introduction

The pharmaceutical industry's role within a highly fragmented health care ecosystem is rapidly evolving from that of a treatment manufacturer to now serving as a trusted adviser to patients—to help them understand their diagnosis and treatment options; navigate to the right health care providers; and facilitate compliance with their prescribed therapy/drug regimens. With these shifts, customer needs, demands, and expectations are also rising.

To fulfill this obligation, pharmaceutical companies first need to recognize that patients play an outsized role in managing their health. Patients, even those with chronic conditions, typically interact with health care providers (HCPs) very infrequently over the course of the year. The rest of the time, it's up to the patients to care for themselves. On top of regular daily activities, patients have to:

- Manage multiple medications and take them all correctly.
- Monitor their conditions and be alert to changes (improvements, deteriorations).
- Adjust their diet and increase or decrease their level of physical activity, or the ways in which they move through their days.
- Cope with the stress of an illness.
- Navigate the complex ecosystem of health care providers, payers, pharmaceutical manufacturers, and pharmacists or other distributors.

Some patients do all of this exceedingly well. But even among the most able individuals, managing one's health and health care without support can be overwhelming. According to the Mayo Clinic, about 40% of patients with chronic conditions report being unable to sustain their current investments of energy, time, and money in health care lifelong.<sup>1</sup>

Pharma companies have a massive opportunity to bridge the patient support gap and better serve the individuals and communities affected by the conditions they treat. Many already do this through companion apps, disease and medication informational websites, above- and below-brand health-and-wellness disease management programs, point-of-care awareness campaigns, and patient services. Amid all these activities, which tend to be episodic and tactical, we have to ask ourselves: Are we giving patients the support they want, in the way they want, when they want it? Moreover, are we meeting and anticipating their needs? Support program usage rates would suggest not.

Research conducted by Phreesia in 2021 asked patients: "Are you currently using patient support programs?" Only 3% of potentially eligible patients said yes. Further, only 8% of patients have ever used support programs for their medications. Study results also indicate that a lack of familiarity with pharma company patient support programs and what they offer may contribute to low usage. Fifty-nine percent of respondents had little to no awareness of patient support programs. If given the opportunity to participate, 61% of patients do not see much value in patient support programs.<sup>2</sup>

How can pharmaceutical companies concurrently increase awareness and usage of patient support programs, better meet customer needs, build and sustain brand loyalty, and grow market share? By focusing on customer experience—the impression you leave with your customer/patient at every touchpoint that drives how they feel about your brand. Rather than treat patient support as a stand-alone program, pharma companies should design a customer experience that integrates patient marketing, engagement, and services across the relationship life cycle—from selling to serving. This process begins by understanding what drives patient brand decision-making.

# Decisions are driven primarily by emotions

Behavioral economists tell us that a great deal of decisions are informed and driven by emotions,<sup>3</sup> even though most people believe that they approach decision-making using logic. In reality, logical thinking cannot always be employed without emotion, especially in decisions that affect life satisfaction.<sup>4</sup> Pharma companies need to figure out which needs and emotions are driving patients to engage with their brand and, conversely, what may happen if the experience falls short.

For some patients, engagement is tied to significance—people want to feel like they truly matter. For others, especially in the case of chronic and debilitating conditions, it's about hope and community—wanting to feel like they're not alone; that they have a kinship with others. Sometimes, patients just want facts, communicated simply and clearly, so they can take charge in their discussions with health care providers. Different audiences, different emotions, different engagement challenges for pharma companies to consider when designing patient support programs that provide a superior customer experience and connect with patients in an authentic way.

Our research found that organizations that have close alignment to their customers' values and leverage resources to create meaningful experiences grow faster and build stronger brand loyalty.<sup>5</sup> Other research shows that customers will engage more if they have a great customer experience, and that higher customer engagement correlates to increased brand awareness and loyalty. Consider the following:

- 80% of customers say they are more likely to do business with a company if it offers personalized experiences.<sup>6</sup>
- 73% of consumers say a good experience is key in influencing their brand loyalties.<sup>7</sup>
- 77% of consumers say inefficient customer experiences detract from their quality of life.<sup>8</sup>
- 81% of companies view customer experience as a competitive differentiator.<sup>9</sup>
- 84% of companies that work to improve their customer experience report an increase in their revenue.<sup>10</sup>
- Companies with a customer experience mindset drive revenue 4% to 8% higher than the rest of their industries.<sup>11</sup>

The way forward seems clear: Pharma companies seeking to strengthen their brand in a category charged with emotion should develop an insight-driven patient support and branding strategy that is responsive, adaptive, experience-focused, and hyper-personalized to the evolving needs of their customers.<sup>12</sup> This brand experience begins with the very first awareness and extends across all touchpoints, to create a desire for patients to engage with all aspects of the brand, including patient support services. In this way, having a strong brand strategy can directly lead to greater uptake in patient support programs, as well as programs that better meet patient needs.



# Tapping into the emotional aspects of human behavior: Brands that do it well

Rather than speaking in generalities, let's look at companies that have embraced customer experience design as a core part of their brand strategy and patient support initiatives.

## **Pfizer: Using real stories to reiterate the importance of planning for COVID-19**

Even though COVID-19 has evolved from pandemic to endemic, it's important to remind people that it remains dangerous. Almost three-in-five adult Americans are at high risk of becoming very sick from the virus, so developing a plan for testing positive can be critical in preventing serious illness. For Pfizer, with its COVID-19 vaccine and antiviral Paxlovid, it's also important to remind people about what the company has to offer. Pfizer's latest COVID-19 commercial includes music artist Pink; drummer, filmmaker, and singer Questlove; actor Jean Smart; and Olympic gold medalist swimmer Michael Phelps, all of whom talk about what makes them at high risk for COVID-19. The spot encourages people to have a plan when and if they test positive for the virus. The relatively unbranded spot drives to a landing page, KnowPlanGo.com, which features real people with diverse underlying conditions. The website outlines the three steps to take to plan for COVID-19 and prevent severe illness. Without overtly mentioning the vaccine or Paxlovid, Pfizer appeals to a range of people in an effort to support patients and serve public health goals.

## **Janssen: Inspiring action in the LGBTQ+ community's disproportionate battle with depression**

Depression is a serious and chronic health condition that disproportionately affects members of the LGBTQ+ community, likely due to often-faced, significant stigma and discrimination.<sup>1</sup> LGBTQ+ adults are three times as likely to have mental health conditions compared to heterosexual adults<sup>2</sup> and are 2.5 times more likely to use mental health services than cisgender heterosexual adults. The Janssen campaign "Depression Looks Like Me" provides clear and easy access to carefully curated information, including directories for LGBTQ+-friendly health care professionals and confidential, trained counselors. Specific resources to support Black, Indigenous, and People of Color (BIPOC) and transgender people are provided, as are general mental health resources. The campaign resulted in an unprecedented 23% conversion rate from the campaign hub to the website (exceeding a 1% industry benchmark) and activated national momentum from psychiatrists, social influencers, and LGBTQ+ and mental health advocacy partners.

## **Band-Aid®: Fostering inclusivity and experience satisfaction through human-centered design**

Since Band-Aid's start in 1921, it had sold the product in only one color. A century later, customers vocalized their disappointment in the lack of a diverse range of skin tones. This omission was further illuminated by the Black Lives Matter movement and momentum around challenging racial injustices. A series of donations, actions, and new products allowed Band-Aid to demonstrate its commitment to equality and sympathy for the criticality of the movement. The initiative's fundamental element was the "Our Tone" campaign in which Band-Aid expanded its product line to include a variety of skin tones. To solidify and strengthen the company's message, visual advertisements for the new products were accompanied by supportive messages. For example, one Instagram caption read: "We hear you. We see you. We're listening to you." Representation matters and, in this case, is a very visible form of patient support, reminding us that this support can take many forms based upon the brand.

In addition to its branding advisory services, Deloitte Digital offers the following assets that work in concert to support and accelerate development of patient marketing and patient services:

**Brandworth™** is a tool designed to help companies measure the key drivers of successful brands. Brandworth's proprietary algorithms model brand impact over time, by audience, against the key performance indicators (KPIs) of message memorability, experience satisfaction, values alignment, and share of culture.<sup>13</sup>

**Values Compass** is a customer analysis tool that identifies what motivates an audience's behaviors, actions, and beliefs as well as where audiences' values overlap. Its proprietary algorithm is built from a data set of 200,000 unique respondents' answers to more than 10,000 questions. Values Compass insights uncover opportunities for companies to increase brand efficiency and effectiveness.

**Patient Connect** is a platform with four integrated components: connected apps and devices, insights and analytics, data hub and exchange services, and patient engagement. Patient Connect delivers consistent, high-touch customer experience across channels, and enables adherence and care coordination across patients' care network—HCPs, providers, and other care team members. It enables life sciences companies to connect with patients and the health care system to deliver better treatment and economic outcomes.

# Judging a brand by the experience

People judge a brand by their experience with it, what it does for them, and what others say about it—not by what the brand says it is. As an industry and a brand, pharmaceuticals need to design and deliver a customer experience that builds trust, offers engaging and responsive support, and strengthens the pharma-patient relationship.



# Contacts

## Mark Miller

Managing Director, Life Sciences Consulting  
Deloitte Consulting LLP  
[markmiller@deloitte.com](mailto:markmiller@deloitte.com)

## Maggie Gross

Principal  
Deloitte Consulting LLP  
[magross@deloitte.com](mailto:magross@deloitte.com)

## Joanna Ruiz

Managing Director  
Deloitte Consulting LLP  
[joarui@deloitte.com](mailto:joarui@deloitte.com)

## Jennifer Machiaverna

Senior Manager  
Deloitte Consulting LLP  
[jmachiaverna@deloitte.com](mailto:jmachiaverna@deloitte.com)

# Endnotes

1. Viet-Thi Tran, Victor M. Montori, and Philippe Ravaud, "[Is my patient overwhelmed? Determining thresholds for acceptable burden of treatment using data from the ComPaRe e-cohort](#)," *Mayo Clinic Proceedings* 95, no. 3 (March 2020): pp. 504–12.
2. Phreesia, "[Industry perspectives: Expanding awareness of patient support programs](#)," accessed June 2, 2023.
3. Mary C. Lamia, "[Like it or not, emotions will drive the decisions you make today](#)," *Psychology Today*, December 31, 2010.
4. Marc Shulman, "[Logic vs. emotions: Which is better?](#)" Long Island Psychology PLLC, June 22, 2017.
5. Amelia Dunlop et al., "[We're only human: Exploring and quantifying the human experience](#)," Deloitte Digital, August 7, 2019.
6. Blake Morgan, "[50 stats that prove the value of customer experience](#)," *Forbes*, September 24, 2019.
7. Ibid.
8. Ibid.
9. Ibid.
10. Ibid.
11. Ibid.
12. Deloitte, "Life sciences marketing reimaged: A virtuous cycle for the future of health," 2023.
13. Deloitte Digital, "[Make brand a C-suite priority](#)," accessed June 2, 2023.
14. Dunlop et al., "[We're only human: Exploring and quantifying the human experience](#)."
15. Ibid.
16. Deloitte, "[Deloitte Digital: Innovative approaches to keep patients connected to the ever-changing healthcare ecosystem](#)," accessed June 1, 2023.



This publication contains general information only and Deloitte is not, by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor.

Deloitte shall not be responsible for any loss sustained by any person who relies on this publication.

**About Deloitte**

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the "Deloitte" name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see [www.deloitte.com/about](http://www.deloitte.com/about) to learn more about our global network of member firms.