

# Disconnected pharma: Navigating digital challenges and priorities in 2024





# Foreword

**We are delighted to present Graphite’s research whitepaper for 2024 – and this year we are able to share the challenges and priorities that digital leaders are finding, in this most interesting of seasons.**

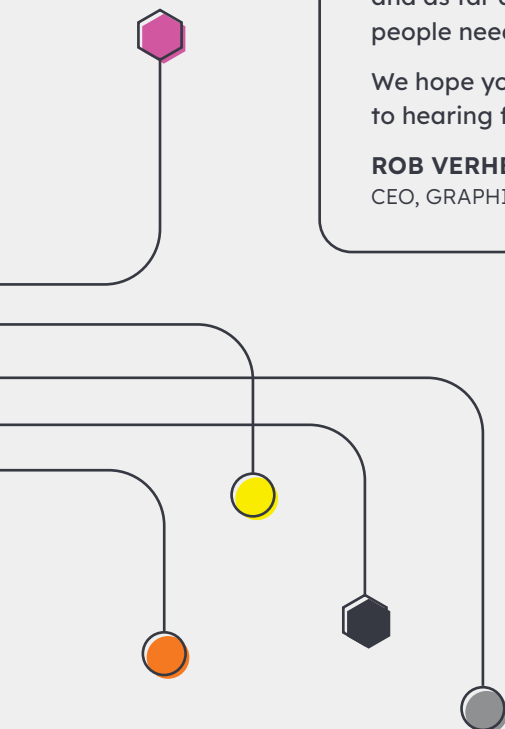
The pharma industry is not known for its openness. We hope that through this report, by sharing what’s really going on, we can encourage better conversations, and maybe, just maybe, greater collaboration.

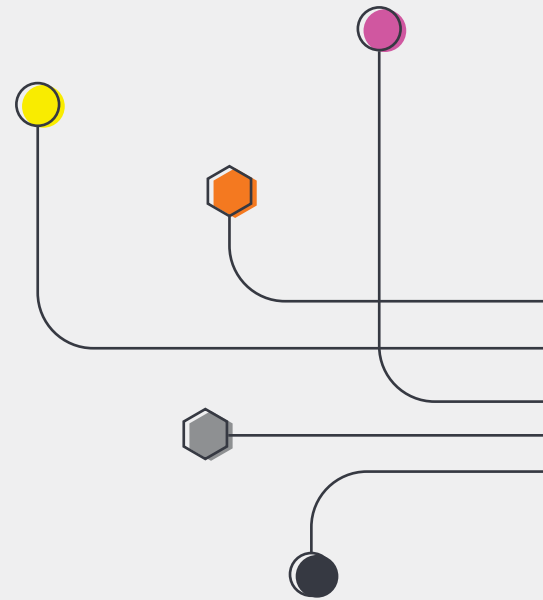
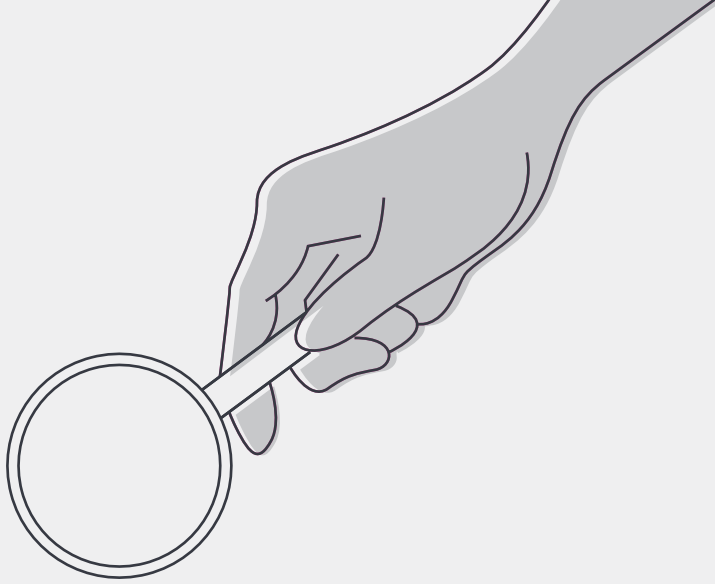
The theme that our data uncovered is connectivity; the central promise of digital channels and platforms, empowering interactions with healthcare professionals, patients, and brands – yet as investment in digital infrastructure continues to increase, and commitment to omnichannel strategies becomes more prevalent, this year’s findings indicate that these strategies are falling short of delivering their anticipated benefits.

Yet, there are encouraging signs. There is an almost universal appreciation for enhancing user experience within digital health solutions, moreover, a surprising number of respondents report actively engaging in user research. This engagement, we believe, indicates a shift towards more empathetic and user-focused healthcare solutions, and as far as we’re concerned, is far more likely to yield the results that people need.

We hope you find it useful, and we look forward to hearing from you with your reflections.

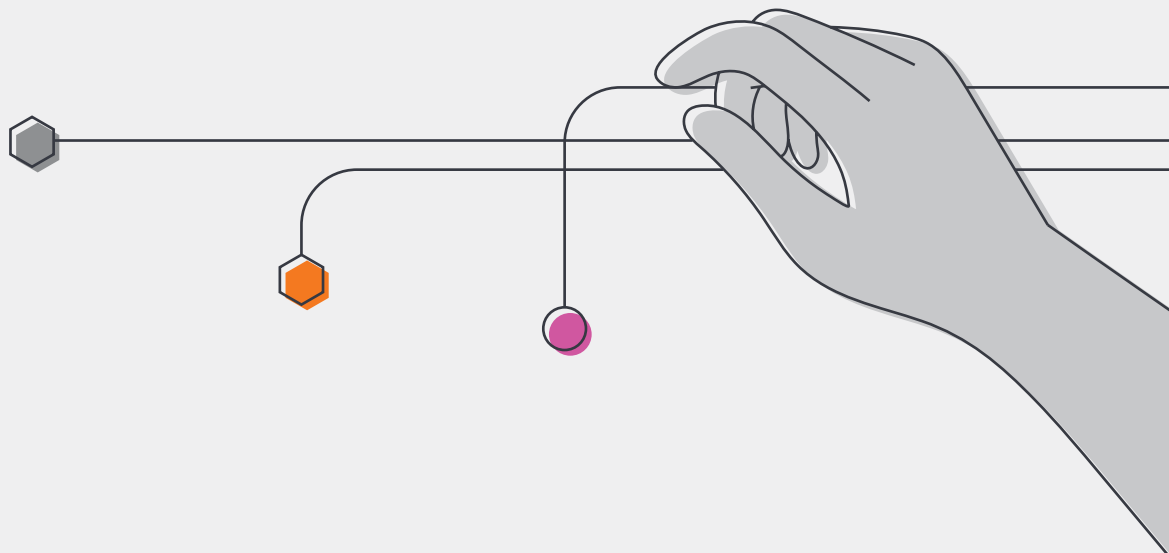
**ROB VERHEUL**  
CEO, GRAPHITE DIGITAL





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# Executive summary

**Our latest research reveals the need for increased connection within the pharmaceutical sector — linking data with actionable insights, joining up internal teams, improving interactions between end users and providers, connecting digital systems and platforms, and aligning long-term goals with short-term priorities.**

Connectivity and alignment underpin innovation, collaboration, efficiency and ultimately improved outcomes for patients and HCPs.

For this research, we spoke to pharma leaders to understand their digital focus areas, challenges and priorities in 2024 and beyond. We asked them where their digital investment will be focused, how their digital products and strategies are informed, and how they measure the success of digital solutions.

We looked at the strategies driving the most success when it comes to customer engagement, as well as the most pressing challenges in this area.

Their responses reveal a sector that is making positive steps regarding digital best practices and maturity, with an understanding of the importance of user experience, customer insight, and the creation of valuable and personalised digital content.

But despite this, significant challenges persist around executing digital strategies successfully.

Teams are struggling to measure the impact of digital solutions, which is limiting scope for continuous improvement. Problems such as misalignment of metrics with strategic KPIs, internal data silos, and the late setting of metrics are widespread. The issue of data security and privacy also presents one of the biggest sector-wide barriers to digital innovation.

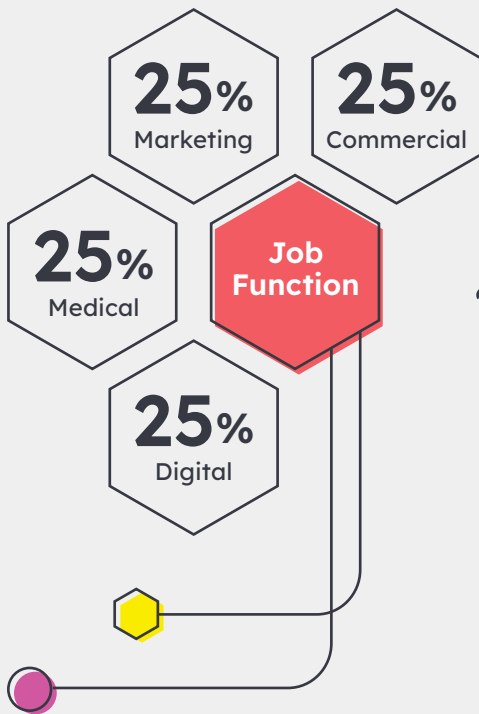
Disconnected tools and legacy systems are holding teams back, and investment in this area will be significant in coming years.

Respondents also spoke of the significant internal barriers caused by organisational structures, mindset and culture, with silos impacting access to insights that could be used to enhance effectiveness, and preventing knowledge-sharing that could lead to joint innovation.

Drawing on the survey data, along with opinions from expert contributors and Graphite's sector experience, we'll explore how, by fostering stronger connections, pharma teams can address the issues highlighted here and achieve success with their digital solutions and strategies.

# Methodology

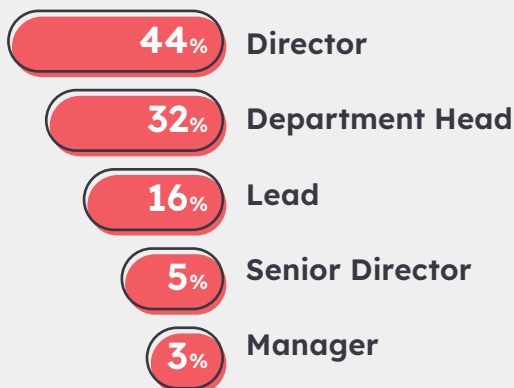
This report is based on feedback from senior-level life sciences executives at the top 100 pharmaceutical companies who hold decision-making power about digital products, services and strategies for their organisation.



## Location of respondents



## Seniority level



## Organisation size

(based on annual revenue)





# Key insights

- ★ **There's no sign of digital investment slowing down in life sciences:** 51% said their organisation plans to increase spending on digital either slightly or significantly in the next 2 years, with the rest maintaining spending at current levels.
- ★ **Internal structures, mindset and culture create silos and impact digital success:** 58% of respondents believe that internal structures within their organisations create the biggest barriers to digital transformation and adoption, and 38% believe it's mindset and culture.
- ★ **Measuring the success of digital products and strategies is difficult, and KPI-setting processes need improvement:** 100% of respondents said they faced challenges around measuring the success of their digital products and strategies.
- ★ **Omnichannel strategies are not delivering the desired results for most organisations:** 77% cited a lack of success with their omnichannel engagement strategies, with problems attributed to data challenges, privacy concerns and issues with strategy and execution.
- ★ **User experience is understood as being crucial for the success of digital solutions:** 99% believe that user experience design is highly important for the success of their digital products, and many are focusing on solving challenges in this area to improve impact.
- ★ **Digital decision-making is increasingly based on customer insight:** 88% said that their decision-making is based on first-hand customer insight — a significant increase from our 2022 research, when only 27% said they always conducted user research for digital products.\*
- ★ **The biggest barriers to sector-wide innovation in the next 5 years are data security, regulatory frameworks, and collaboration:** 37% said that robust data security and privacy will be crucial for digital disruption, and 20% highlighted a need for collaborative partnerships.

\* The Contradiction Conundrum Report 2022, by Graphite Digital, based on views of 450 global pharma executives.

# Digital focus areas, challenges and investment 2024

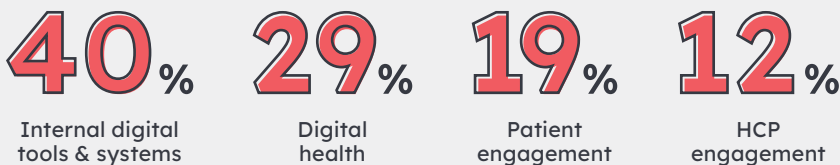
## Internal tools and digital health solutions are top of the agenda, with HCP engagement dropping down the priority list

When we asked our respondents about the types of digital products their organisation is focused on creating in 2024, **40% said internal digital tools and systems were the top priority**. When asked about the biggest internal barrier to digital transformation, **35% also put this down to tools and platforms** and said that they were working with platforms that hold them back.

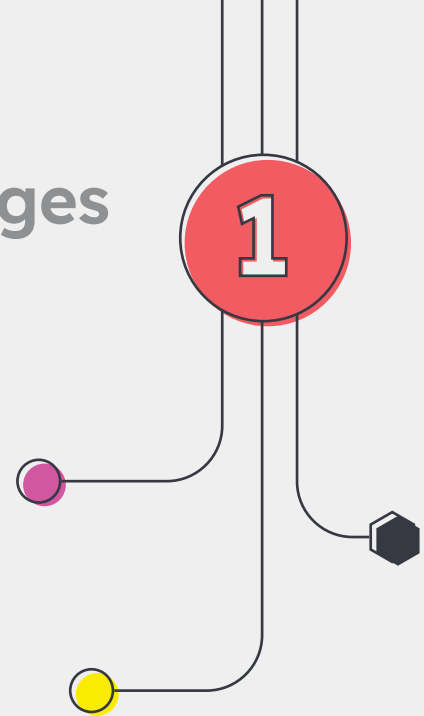
Are we in a fallow year for customer engagement? With high levels of investment in digital HCP and patient engagement in the years since the pandemic, this represents a significant shift in priorities. It indicates that organisations are focusing on getting their internal processes and tools in order to be able to make more data-informed decisions when it comes to engaging with customers. Organisations are outgrowing their existing systems and struggling with inefficiencies caused by legacy tools. Disconnected digital systems cause significant challenges and lead to disjointed customer experiences.

The industry is also evolving in terms of who it deems to be the end customer. As patients are increasingly informed and empowered when it comes to their health, with more decision-making power and influence over the treatments they undertake, organisations are more focused on digital patient engagement and digital health tools than HCP engagement which was the top focus area for only 12% of respondents.

### Which types of digital product is your organisation primarily focused on creating in 2024?

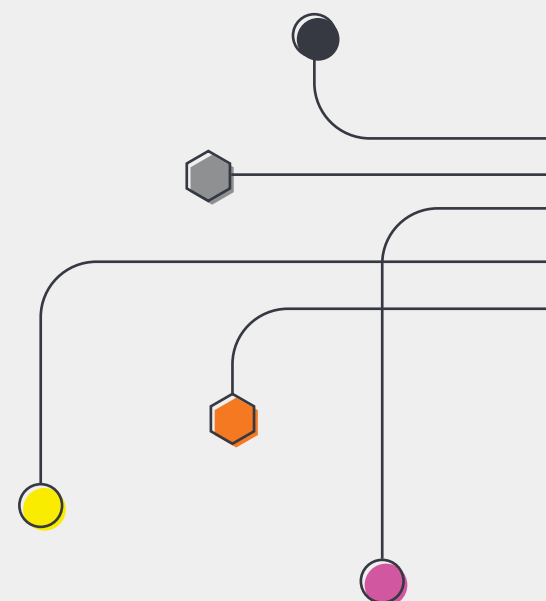


**Digital health solutions, including Digital Therapeutics (DTx) and Software as a Medical Device (SaMD), were the top focus area for 29% of respondents.** This shows that digital health is still high on the agenda for many pharma organisations, despite investment in the wider digital health space slowing down in the last couple of years. Whether pharma organisations are partnering with or acquiring digital health companies, or going it alone and launching their own solutions, this presents many opportunities for companies to directly engage with patients in new ways. To drive repeat engagement and promote long-term behaviour change, the design of these digital solutions will be key to their success.



**“Although the data suggests a short-term shift to focusing on internal tools and patient engagement, I don’t believe this will be a long-term trend. The reality is that HCP engagement will always be the top priority for pharma. I think this shows that people answer questions based on what they think they should say, rather than what they are actually doing.”**

**ANDREW BINNS** - HEAD OF DIGITAL AND INNOVATION, ASTRAZENECA





# 51%

**plan to increase spending on digital in the next 2 years**

## **Investment in digital products and services will continue to grow in the next 2 years, and demonstrating ROI will be key**

There are no signs that investment in digital is slowing down, despite the rate of digital transformation and spending across the sector in recent years — with **51% of respondents planning to increase spending, and no one planning to reduce it**. This is a positive sign that existing digital initiatives will either be sustained or increased, and shows a commitment to thinking long-term and pursuing innovation.

When we asked participants about the biggest internal barriers to digital transformation and adoption that they face, **36% put this down to budgets and there not being enough investment in digital products and strategies, or people being unrealistic about costs**.

In order to secure further investment, it will be crucial to demonstrate the ROI of digital solutions and initiatives, which can sometimes prove challenging within pharma. Having a clear understanding of the “why” behind all projects from the outset will help set meaningful objectives and KPIs that can be used to demonstrate value — from both a business and customer perspective. There needs to be a clear connection between business goals and outcomes.

Taking an iterative approach to digital product or service development can also help. Focus on creating a minimum viable product (MVP) in a lean, cost-effective way. Then launch it, test it with users and stakeholders, and gather early engagement data to prove value and gain internal buy-in. Having real evidence to prove concepts will build confidence and help secure additional funding to evolve solutions.

# 36%

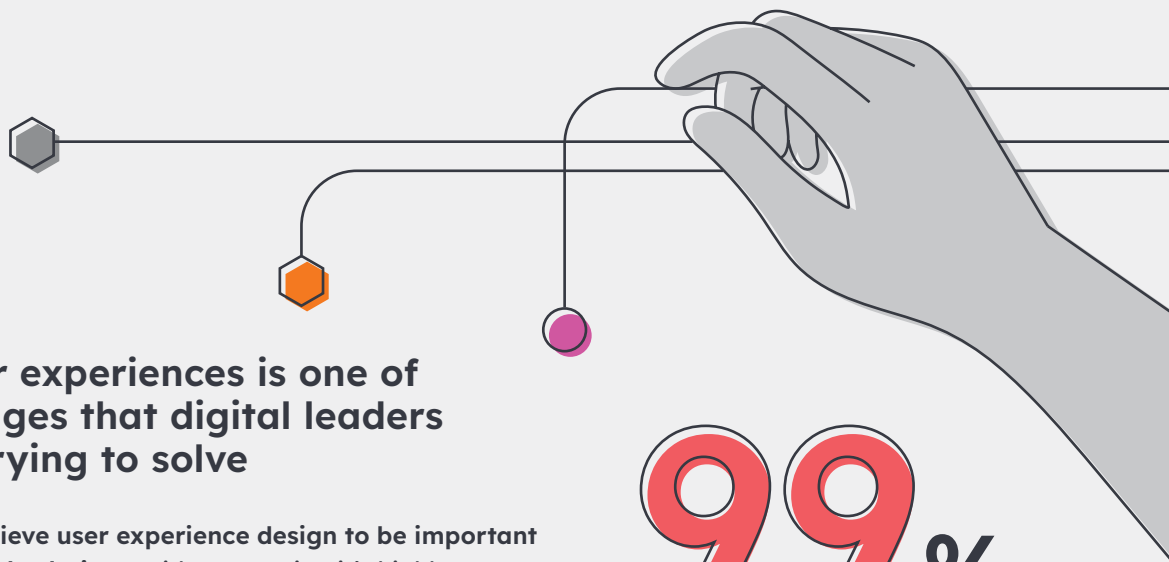
**believe that internal budgets are the biggest barrier to digital adoption and transformation**



**“Pharma can demonstrate the ROI of digital solutions by leveraging data analytics to show tangible improvements in efficiency, KPIs, and/or cost savings.”**

**SARAH CHRISTENSEN** - NORDIC DIGITAL DIRECTOR, NOVARTIS





## Enhancing user experiences is one of the key challenges that digital leaders are currently trying to solve

99% of respondents believe user experience design to be important for the success of digital solutions, with 37% saying it's highly important, and 62% deeming it somewhat important.

But despite understanding it's importance, enhancing user experiences to drive engagement is one of the biggest challenges that teams are currently trying to address. When we asked participants to describe their most pressing digital challenge in a few words, this was one of the most cited areas.

# 99%

believe user experience design is important for the success of digital products and services



“With our digital strategies, we want to enhance the practicality of using the platform. Ease-of-use is the main focus here.”



“It’s our aim to enhance the convenience of using our platform. Teams are determining suitable ways to achieve this goal.”



“Making sure that the digital services are attractive enough to retain users.”

Whether patients, HCPs or other consumers, user experience design is critical when seeking to bring about behaviour change and encourage people to use a new digital tool on a sustained basis.

The primary benefit of technology is that it makes our lives easier. If digital solutions are difficult to use, it causes frustration and instantly makes users disengage. No matter how good the content, technology, or marketing around a digital product, if it's not intuitive and doesn't provide a positive user experience, people will be less likely to return to or advocate for it.

“Across all owned, paid, and earned digital environments, user experience is a critical component of customer sentiment and perception of value. When ignored or otherwise overlooked it can be a rate-limiting factor in winning with our customers.”

GLOBAL DIGITAL HCP  
ENGAGEMENT LEAD -  
AT TOP 10 GLOBAL PHARMA ORG

### Insight into action: 3 top takeaways

- 1 Don't risk being left behind when it comes to your internal digital tools and systems – it's clear that many in the sector are investing here to drive efficiency
- 2 Think about purpose, long-term goals, and success metrics early so that you can demonstrate the ROI of your digital products and secure further investment as required
- 3 Ease-of-use is key for the success of your digital solutions – above all else they should be intuitive, convenient, and in line with what users expect from other digital services they interact with day-to-day



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# Digital decision-making and customer insight

## Creating deeper connections with customers to enhance digital impact – how alternative feedback channels can help

The majority of respondents reported that customer insights heavily influence their digital decision-making. **25% said that all their decisions are based on first-hand customer insights, and 63% said that most of their decisions were based on this.**

Of those in Medical roles, **20% said that their decision-making is rarely or only sometimes based on customer insight** – the highest across all job functions. With many Medical colleagues having clinical backgrounds, they may feel they already understand customer needs and experiences and have less need to seek new insight on an ongoing basis. This could be impacting the success of digital product launches, with only **24% of Medical respondents saying their digital products always deliver the expected results, compared to 36% for Marketing.**

In terms of where customer feedback is coming from, focus groups, surveys and online feedback requests were the most common methods used. This presents an opportunity to gain a deeper level of customer insight and connection through one-to-one interviews and more qualitative approaches. These are particularly key for patient-facing products and digital health initiatives, where pharma teams need to understand the full context of the patient experience to create successful, impactful interventions.

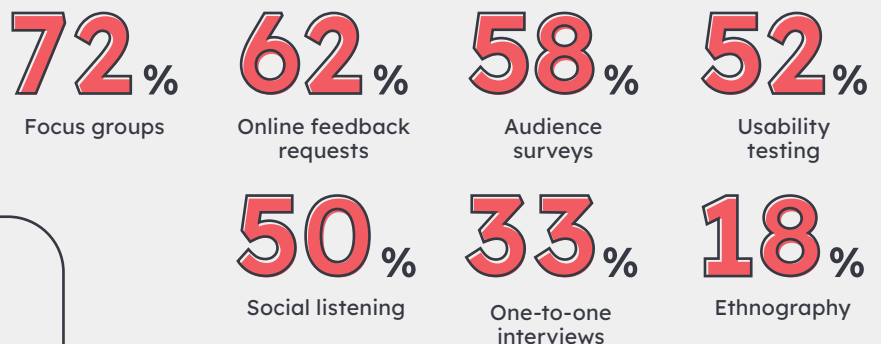
Focus groups, which are heavily relied on in pharma, are often discredited within user research communities as an unreliable source, due to bias in picking the groups, vested interest and conflicting incentives in membership.

“Pharma, in comparison to other industries, tends to rely on more traditional feedback methods such as market research, ad boards, surveys etc. I would like to see more reliance on data and analytics as a means to gain comprehensive and nuanced customer insights to inform iterative improvements tailored to our audience’s needs.

How our customers interact or do not interact across our digital channels is a means of feedback, and an aggregated quantitative view can tell us more than qualitative feedback from a select few.”

SARAH CHRISTENSEN - NORDIC DIGITAL DIRECTOR, NOVARTIS

## What type of primary research do you currently undertake in the context of digital products and services?\*



\*Respondents were asked to select all that apply

## Obtaining customer insight to inform digital decision-making is difficult, despite most organisations saying they do it

Although most organisations are basing decision-making on customer insight, acquiring this information can prove challenging. Participants spoke about difficulties in accessing or engaging patients and HCPs for digital research purposes, as well as interpreting user feedback to take action.



“Researching client requirements is a big problem because we cannot get time with them to discuss issues.”

“It’s difficult to gauge the needs of users without connecting with them. They are not forthcoming when it comes to providing feedback. We are trying to collect feedback more systematically using digital tools.”

“We’re focused on developing multiple solutions, each with different users in mind. It is difficult to understand user perception and requirements.”

To overcome these challenges, there are a few things pharma teams can do. Firstly, clarity around research purposes and requirements is crucial – people need to understand what’s needed of them, how it will benefit them in the long run, and to feel reassured about confidentiality and privacy when sharing their views.

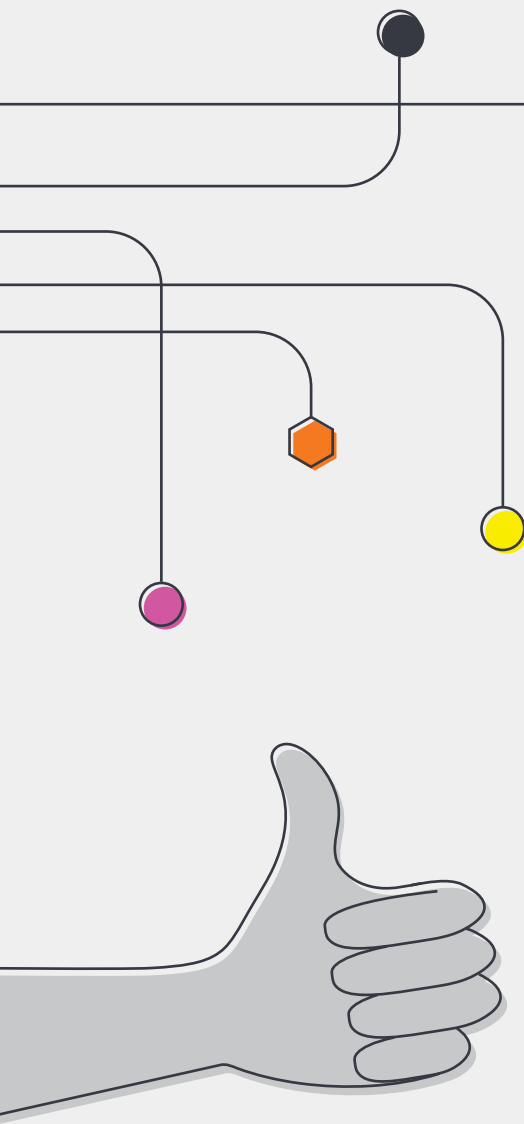
Secondly, practical incentivisation in the form of financial reimbursement for time spent sharing feedback is important and demonstrates respect for your customers and their time.

Finally, working with an external research partner who can approach projects objectively, and has experience in turning raw findings into actionable, prioritised insights will increase the chances of success.

Remember that customer research doesn’t have to require a huge investment of time and money – qualitative insights from a relatively small group of people can provide rich feedback into the needs and behaviours of your target users.

**“In the near term the most important thing pharma companies can do to improve digital experiences for HCPs and Patients is RESEARCH. Simply put – ask them what their biggest challenges are and investigate how willing they are to use digital solutions from pharma companies to solve those problems. The more we use Digital to solve HCP and Patient challenges vs using digital to disseminate campaign messages the more we can improve outcomes and drive value.”**

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## Building trust and strengthening relationships through transparent, open communication

[Our last whitepaper](#), based on research with HCPs in the UK, US and France about their perceptions of pharma-owned digital channels and content, highlighted a widespread lack of trust and how this impacts digital engagement. This time, we asked those working in the sector about what they are currently doing to build trust and facilitate stronger relationships.

**The top response was open communication and transparency.** Organisations are focusing on open communication with patients and HCPs – regularly seeking feedback, addressing concerns promptly, and maintaining transparency when creating and sharing digital content. **The second most common answer was around feedback incorporation and resolution**, with teams actively listening to feedback from patients and HCPs, considering their suggestions during content and product development processes, and ensuring the resolution of any issues raised.

These responses highlight how important two-way communication and feedback loops are for the success of digital products and strategies, and building stronger connections between customers and pharma organisations.

### What does your organisation do to build trust among patients and HCPs through your digital channels and content?

- 1 Open communication and transparency
- 2 Feedback incorporation and resolution
- 3 Quality assurance and compliance
- 4 Patient-centric approach
- 5 Continuous improvement and engagement

“Where digital experience is poorly understood or less-valued, it may be due to a brand/product driven culture. Pharma colleagues often look at the customer and their experience through the lens of one product/ medicine. Whereas I believe the Digital Customer Experience is a broader part of the company as a whole.”

GLOBAL DIGITAL HCP ENGAGEMENT LEAD - AT TOP 10 GLOBAL PHARMA ORG



## Driving success with a customer-centric approach to content creation, technology choices, data utilisation and feedback responses

When we asked what factor had been most significant in driving digital customer engagement in the last 12 months, the top response was content quality and relevance. Participants emphasised the importance of creating and sharing fresh, creative, and relevant content — based on first-hand insights and tailored to customer preferences — across various digital platforms.



“Ensuring personalised content was important for driving digital customer engagement.”



“Creating engaging content that relates and connects with the customer has helped us in this regard.”

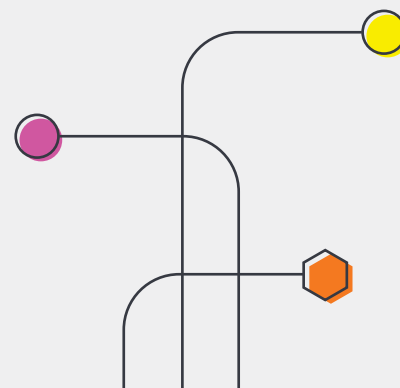
The teams that have seen the most success from their digital products and services are those that have adopted a more customer-centric approach, centred around things like timely responses to customer queries, effective utilisation of customer data and insights, and customer-focused team structures.

Participants spoke about the importance of acting on concerns in real time, being readily available to respond to queries and opening direct channels of communication with customers. This should be considered when designing digital platforms, with easy-to-find contact-based CTAs and transparent information about communication channels.

Others mentioned the impact that mapping and understanding customer journeys had on digital engagement, allowing them to streamline and improve experiences by having an in-depth view of digital pathways. Outlining your current processes helps to visualise what the customer is experiencing in real time and will unveil common pain points that need to be addressed, and other opportunities for improvement.

### What factor has been the most significant in driving digital customer engagement in the last 12 months?

- Creating engaging, relevant and fresh content
- Effective use of customer engagement data
- Responsiveness to customer feedback and concerns
- Utilising the right platforms and technology, including AI
- Conducting regular research with customers
- Dedicated teams focused on customer engagement and experience
- Reviewing and streamlining customer journeys
- Continuous learning and improvement



### Insight into action: 3 top takeaways

- 1** Make time for in-depth, qualitative customer research to compliment quantitative methods and provide a holistic picture of your customer experience and real-life context
- 2** Don't make assumptions about what patients or HCPs need from your digital solutions or content, no matter your previous experience and level of understanding
- 3** Ensure that communication channels are easy-to-find within your digital platforms to allow customers to submit feedback, raise concerns and speak directly with relevant teams



3

## Internal structures, silos and mindsets

### Better connection between teams is needed to overcome challenges and improve digital impact

Internal structures, mindset and culture continue to prove to be significant barriers for digital success within pharma. There is a need for organisational change management to foster stronger connection and collaboration.

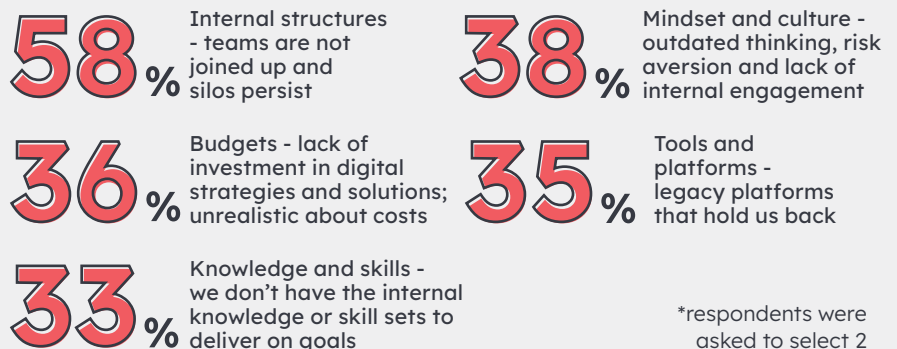
**58% of respondents believe that internal structures within their organisations create the biggest barriers to digital transformation and adoption.** Silos between departments lead to all kinds of problems – duplication of efforts and investment; disjointed customer journeys and experiences; impact on culture and morale due to power struggles between teams, to highlight just a few.

When we asked about the effectiveness of current omnichannel engagement approaches, low success was frequently attributed to inefficiencies in communication between internal teams. One participant commented, *“I think that the lack of communication among internal units has caused approaches to be unsuccessful.”*, whilst another said *“teams have been unprepared to change engagement strategies and approaches and this has been a major hindrance for us.”*

Internal silos significantly impact access to the data and insights that can be used to enhance effectiveness and drive success, and prevent knowledge-sharing that could lead to joint innovation. When asked about challenges around measuring the success of digital solutions, **61% said they face internal data silos and barriers to accessing engagement data.**

Centralised digital hubs, with thorough documentation on the whats, whys and hows of products and their processes, can help align teams and build shared understanding. With everyone referencing the same materials as a single ‘source of truth’, there’s less reliance on word of mouth or meetings to disseminate information.

### What do you think are the biggest barriers to digital adoption and transformation within your organisation?\*

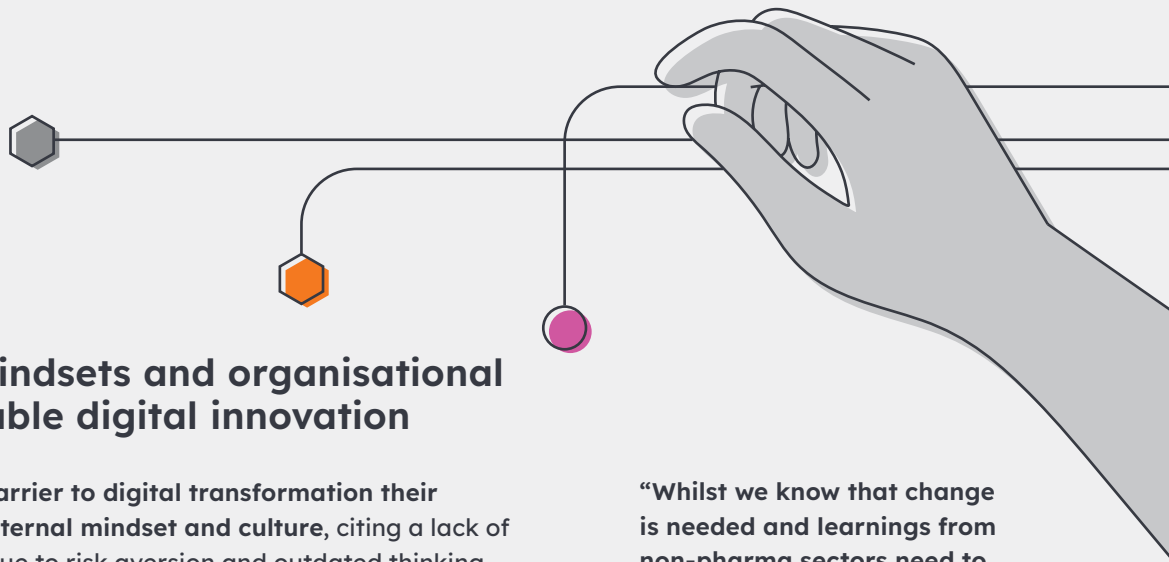


\*respondents were asked to select 2

“The siloed structure in pharma – whilst historically strategic and aimed at optimising deep expertise – has become a liability. Especially post-pandemic, where we need a dynamic, customer-centric, responsive company. Silos prevent us from dreaming up fresh, imaginative strategies and responding to rapid market changes.

To solve this, I suggest that pharma starts by creating ‘translational leaders’ who can bridge these divides. These aren’t new roles, they are changing the responsibilities of existing leaders to be broader. These leaders should be adept not only in their specialties, but in integrating insights across functions, translating diverse expertise into cohesive strategies that anticipate and meet customer needs more holistically.”

PAUL SIMMS - CHIEF EXECUTIVE, IMPATIENT HEALTH



## Modernising mindsets and organisational culture will enable digital innovation

**38% said the biggest barrier to digital transformation their organisation faces is internal mindset and culture**, citing a lack of engagement in digital due to risk aversion and outdated thinking.

It's not possible to change the culture of an organisation overnight, and the reasons for being naturally cautious within a highly regulated sector are clear, but there's scope to evolve ways of working and thinking to improve digital impact. This change comes from the top and must be embraced and spearheaded by senior stakeholders, whose leadership is essential for internal alignment and collaboration. Processes that have not changed in years may also have to — such as the approach to regulatory reviews and approvals.

### What can companies do to bring about culture and mindset change?

Organisations should encourage experimentation and agile working to enable digital innovation, and promote the idea that it's okay to fail in the process. Short-term experimentation leads to long-term success. Working iteratively in the context of digital products and experiences facilitates this and reduces risk, and often cost.

Internal change management should be factored into the scope of any digital initiative. We have seen the most success when this is handled like the launch of a new product, with a clear engagement or socialisation strategy. Make use of campaign-style engagement strategies like film, motion graphics, email content and interactive Q&A sessions to drive interest and buzz and bring teams from across the business on board.

Partnerships with external experts will also bring in fresh perspectives and mindsets within more traditional organisations. Introducing diversity of perspectives and expertise will help them become less blinkered and understand alternative approaches.

**“Whilst we know that change is needed and learnings from non-pharma sectors need to be taken on board, its worth stating that our industry is delivering great work that is highly respected in other industries. The grass isn't necessarily greener on the other side of the fence and I, for one, am incredibly proud and excited to work in pharma. We also need to acknowledge that we are an industry with many factors that influence and impact prescribing behaviour beyond great marketing and customer engagement.**

**Pharma doesn't need to transform completely to succeed — it's a successful business model, has been for decades, and will be in the future.”**

**ANDREW BINNS** - HEAD OF DIGITAL AND INNOVATION, ASTRAZENECA



### Insight into action: 3 top takeaways

- 1** Internal communications around digital strategies and solutions are just as crucial as your external launch — knowledge-sharing and enabling moments of true connection is key for breaking down silos and securing buy-in
- 2** Embrace an iterative approach to digital product development centred around continuous improvement and learning in order to evolve mindsets, whilst reducing risk and costs
- 3** Developing a 'Proof of Value' with an initial MVP (minimum viable product) is great way to build a narrative that demonstrates ROI and engages internal stakeholders



4

## Data, metrics and KPIs

### Connecting the dots between data sources to enhance customer experiences

Pharma teams sit on vast amounts of data but struggle to know how to use it meaningfully to inform their digital strategies and approaches. By connecting the dots between data sources and making the insight actionable there is huge potential for improving customer experiences.

When we asked which factor would have the biggest impact on enabling better digital experiences for their customers, **49% said they needed to learn how to better use data to offer a more personalised experience, and 51% said that enhancing user experiences across all digital platforms would be key.** User experience and data-informed personalisation go hand-in-hand – the more we can tailor experiences to users on an individual basis, the better the user experience we can offer.

The organisations that are seeing the most success are those that leverage customer data effectively to understand engagement challenges, analyse behaviours, and personalise interactions, including mapping customer journeys and analysing feedback for refining strategies. When we asked respondents about the factor that has been most significant in terms of driving digital customer engagement in the last 12 months, this was one of the top responses:

**49%**

said they needed to learn how to better use data to offer a more personalised experience



“The use of customer data has been optimum, and this led to greater success with our digital customer engagement plans.”



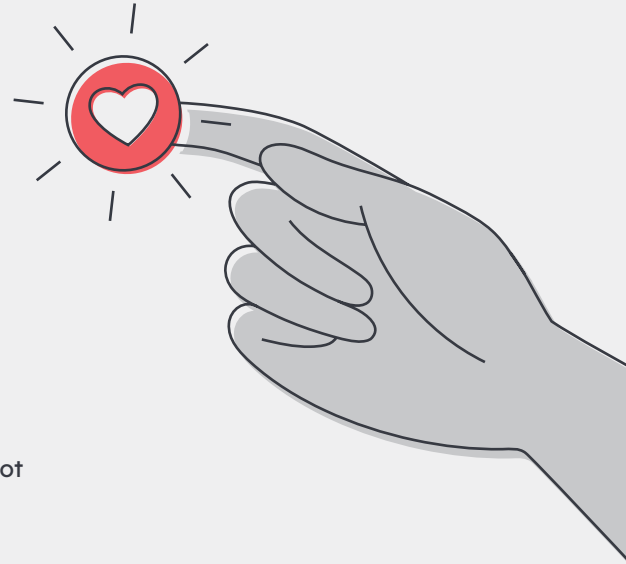
“Focus on data has been one of the most significant factors driving digital customer engagement.”

“Primary focus on data and getting the right quality of data can be said to be the key factor.”

“I think the gap between metrics and strategic KPIs is a curious thing because our industry is deeply rooted in strong data and metrics on the science side. Where this gap exists it may be a result of the confidence we have in our messaging and ability to segment our audiences. But it’s important – even for the most seasoned marketer – to clearly define success at the outset and use evidence to make investment decisions. Leadership can make a difference as well – by asking thoughtful questions that require good data to support answers.”

GLOBAL DIGITAL HCP ENGAGEMENT LEAD - AT TOP 10 GLOBAL PHARMA ORG





## Data management and utilisation underpin omnichannel success

Omnichannel engagement has been a big focus area in the sector for a number of years. But despite most businesses now embracing an omnichannel approach – only 9% of our respondents said they were not – the results have not lived up to expectations for many.

**77% of respondents said that their omnichannel strategies had little to no impact on customer engagement**, and that they have experienced many challenges around implementation and enablement. The top challenges mentioned were around data security and privacy, and the need for better data management and utilisation.



“Omnichannel delivers when the right data gets utilised. We are currently working towards solving this problem.”

“The kind of data and engagement we deal with is sensitive in nature and we have not been able to handle it efficiently”

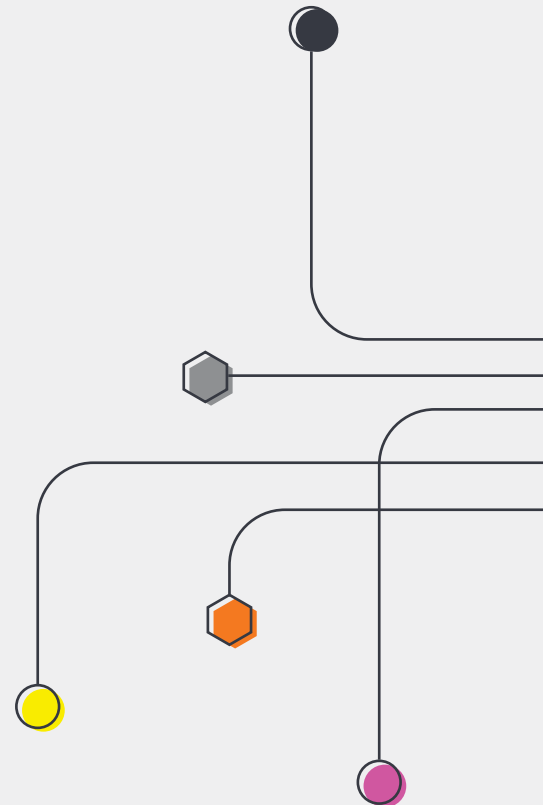
“Most of the digital customer engagement platforms are integrated based on data inputs. We have been struggling in getting the right data to deliver on the results”

The organisations that are seeing the most success from their omnichannel approaches are those with an annual revenue of \$10 billion+ per year, of which 29% reported highly successful outcomes here. Companies of this size are more likely to have been able to invest in more sophisticated data management and analysis, as well as other areas such as customer feedback.

One participant who reported high levels of omnichannel success commented “*Our omnichannel strategy has been centred around creating a comprehensive data source. It’s one of the main reasons for the high success rate*”. Another said “*each platform has its own dynamics and when one understands it, it is easier to get optimum returns from it*”.

# 77%

of respondents said that their omnichannel strategies had little to no impact on customer engagement





## Metric-setting for digital solutions is often overlooked, or focused on tracking the wrong things

Metric-setting and measurement processes need to evolve further, with teams taking a more long-term and strategic view. This means connecting product or project KPIs with wider strategic goals to provide direction and purpose from an early stage. **64% said that the metrics they track are not aligned with wider strategic KPIs**, **54% said that KPI setting happens too late in the deployment process**, and **47% said there's too much focus on vanity metrics and short-term gains**.

In some cases, metric-setting is not happening at all, with **19% of those we spoke to saying they do not have any defined KPIs or metrics to support their digital decision-making**.

One participant commented *“There is very limited knowledge about the effectiveness of our digital solutions, and gathering data on customer experience will be vital”*, whilst another said *“Collating customer data for analytics is a major problem. We believe there is data leakage which does not give us a clear picture of things”*.

Problems with analysing data often arise from the overwhelming amount of data available. You don't need to track everything to understand the effectiveness of your solutions and make improvements. Decide on a handful of key metrics, that are connected to wider organisational KPIs, and focus on these. Once you're comfortable with understanding them and implementing findings, you can expand measurement processes to consider new data points.

### Insight into action: 3 top takeaways

**1** Start small when it comes to measurement, focusing on a handful of the most meaningful metrics that are connected to wider strategic goals and will allow you to make improvements

**2** Engage all key stakeholders in early measurement conversations to ensure reporting will meet the most critical needs and tell the right stories, particularly if additional or ongoing investment is required

**3** Make sure measurement frameworks speak to both user and commercial needs to enable balanced decision-making for continued development and optimisation

### What are the biggest challenges around measuring the success of digital solutions?\*



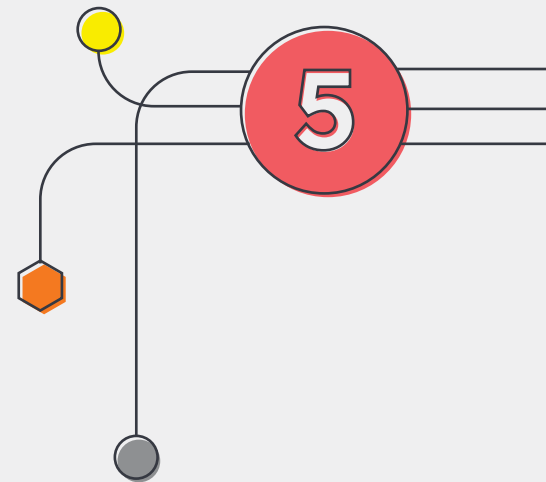
\*Respondents were asked to select all that apply

# Looking to the future: Unlocking innovation and disruption

## Addressing concerns around data security and privacy will be key for pharma in the next few years

Throughout our survey responses, the issue of data security and privacy came up frequently. This is a key priority for those working within the pharma sector, who are asking — how can we advance our digital strategies and become more data-driven, whilst keeping vast amounts of customer data secure and meeting ethical and regulatory standards?

When we asked participants which factor they think will be most important for driving digital innovation and disruption in the next 5 years, the top response was ensuring robust data security and privacy measures (37%). Of those who said they were planning to increase investment in digital, many also said this will be focused on data security.



“Data security is one of the prime focus areas for investments for us.”



“Our priority focus area is around data security and risk management.”



“The spend on enhancing data security and privacy models will be increased in the next 2 years.”

The right data strategy sets the foundation for delivering intelligent and personalised user experiences across multiple channels. This is no small feat and requires the necessary planning, technology, systems and resources.

In addition to this, many are struggling with the challenges of storing vast amounts of data in a way that minimises the risk of data breaches or security issues. Evolving regulatory frameworks regarding digital data sharing and management make it difficult to know whether data utilisation and retention is compliant, and some point to the ethical issues around the scale of customer data collected.

Pharma teams are looking for digital platforms and technology that can address these concerns and put minds at ease when it comes to data security. This will allow them to focus on using data in a positive way to learn about how customers are interacting with their tools and create better, more personalised experiences.

“Many organisations pour funds into external compliance or security solutions. However, imagine a football team that doesn’t understand the offside rule because they’ve outsourced it: no matter how well they can pass the ball, they’ll frequently be penalised for playing the game incorrectly.”

PAUL SIMMS - CHIEF EXECUTIVE,  
IMPATIENT HEALTH

## What factor do you believe will play the most crucial role in driving digital disruption and innovation within the pharmaceutical sector in the next 5 years?

**37%** ensuring robust data security and privacy measures are in place

**20%** more collaborative ecosystems and partnerships within the industry

**13%** seamless integration of emerging tech like AI and IoT

**12%** investing in talent development and upskilling

**11%** evolving regulatory frameworks to account for digital advancements

**7%** a more patient-centric approach



# 1 in 5

respondents believe that more collaborative ecosystems and industry partnerships is crucial for driving digital disruption and innovation in the next 5 years

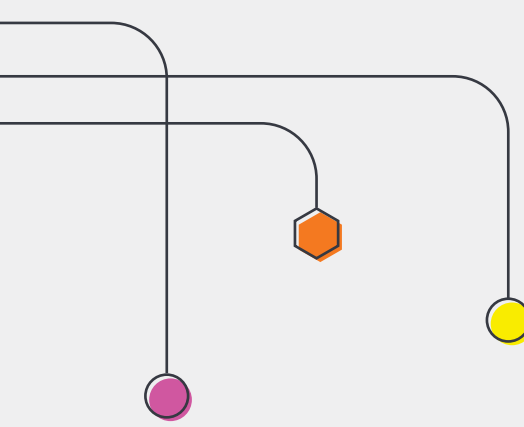
## Advancing innovation through connection and collaboration on a sector-wide scale

We've spoken a lot about the need for enhanced internal connection – between teams, with customers, between data points and between platforms. But this idea of increased connectivity extends to the wider pharma sector too.

1 in 5 respondents believe that more collaborative ecosystems and partnerships within the industry to facilitate knowledge-sharing and joint innovation will be crucial for future success. Additionally, 55% believe that their organisation is digitally mature, and 4% believe they are a leader in the field – at the forefront of digital innovation and setting industry standards.

This presents an opportunity for organisations to show their commitment to advancing health outcomes and put purpose before profits to bring about positive change. By sharing successes, learnings, and knowledge, those who are currently ahead of the curve when it comes to their digital initiatives and impact can help improve standards across the sector.

Big challenges – such as creating impactful digital health solutions, or dealing with issues around privacy, security and regulation in digital – require sector-wide, collective responses and efforts to overcome them. By building stronger connections between organisations, healthcare systems, regulatory bodies, and so on, we can advance innovation and improve outcomes for patients and HCPs.



“Data security is vital, but it must be internalised, not passed to someone else. It should be a deep-seated discipline if it's to enable the industry's capacity for innovation. Then regulations don't just become constraints but frameworks within which they can safely and creatively experiment – and given the myriad possibilities of this new AI-powered world, that experimentation will be really important.”

PAUL SIMMS - CHIEF EXECUTIVE,  
IMPATIENT HEALTH

### Insight into action: 3 top takeaways

- 1 Conduct an initial performance, security and capability assessment on your data strategy, taking a long-term view on embedding a new strategy, then carving it out into key phases for implementation
- 2 Whether external partners, in-house consultants or skilled new hires, you will need dedicated and specialist resource for implementing enhanced data strategies that will significantly elevate your technical infrastructure and security operations
- 3 Look for ways to build stronger connections and share knowledge with others across the wider healthcare sector to raise digital standards across the board and enhance patient outcomes

# Graphite perspectives

## How mapping customer journeys will help you create connected digital experiences

Mapping customer journeys is crucial for creating connected and engaging digital experiences. Our research shows that the organisations seeing the most success from their engagement initiatives are those with a thorough understanding of their customer journeys. They provide a roadmap for meeting user needs by understanding the full context of their day-to-day experience — both practical and emotional.

Customer journey maps allow stakeholders to gain insights into the various touchpoints and channels through which individuals interact with their platforms. By comprehensively mapping out the customer journey, teams can identify pain points and opportunities to make impactful changes to the user experience. Addressing them will foster trust, connection and loyalty.

The optimisation of each touchpoint helps overcome challenges arising from organisational silos and disconnected platforms to ensure a more seamless and intuitive user experience. It's also key for facilitating personalised and targeted engagement strategies.

So, where to start when mapping your customer journeys?

You'll need to begin by defining your objectives, then gathering as much information as you can from existing research, stakeholder input and your platform engagement data. Use this to identify key customer touchpoints, create personas and begin mapping. Then, it's time to speak to customers first-hand to delve deep into their experiences, uncover pain points, and understand the context in which they interact with digital solutions, before refining your journeys and starting to put insight into action.

## From tiny acorns, mighty oaks grow — using 'proof of value' to overcome challenges

As the famous proverb goes, from tiny acorns, mighty oaks grow — meaning something great and significant can come from modest beginnings. In pharma and healthcare, driving change requires resilience and patience and our research findings show that teams struggle to secure the required investment in digital initiatives, often due to difficulties proving their ROI. Reframing the question to think early about a 'proof of value' can help overcome these challenges.


The first step is to identify what a 'modest beginning' looks like for large-scale digital transformation initiatives, in the format of a 'proof of value'. Ask the question, 'what could you prove internally to gain further traction' in the context of what you're trying to achieve — a clear impact on the bottom line/commercials? Enhanced engagement with HCPs, affiliates, or patients? Optimised conversion metrics? And so on.



**Edward Hart**  
HEAD OF DESIGN,  
GRAPHITE DIGITAL



**Holly Mitchell**  
CLIENT STRATEGIST,  
GRAPHITE DIGITAL



The proof of value process leap frogs arduous planning phases and extensive team sizes and focuses instead on a clear mission to achieve specific evidence against a proposed hypothesis. This can then be packaged up with a clear narrative for internal sharing and socialisation.

The benefits of the proof of value include significantly reduced risk, and less immediate senior and regulatory approvals as well as attracting and securing investment in the workstream. The smaller scale early initiatives build confidence and reduce resistance when the larger-scale workstreams are executed. For senior stakeholders, the proof of value facilitates early and effective decision making in terms of further development and rollout of wider reaching programmes of work.

## Driving organisational change: Follow a clear process, manage expectations and approach iteratively

Implementing large-scale organisational change is a multifaceted process that requires meticulous planning and execution. From initial benchmarking to the establishment of clear goals and KPIs, and from internal process adjustments to comprehensive staff education, every step demands time and dedication. Crucially, these changes must be driven by strong senior leadership, ensuring transparent communication and a smooth transition for all involved. Engaging a senior-level steering group and identifying critical ‘enabling’ stakeholders upfront to define the objectives and outcomes will derisk the delivery of a transformation programme.

Although there may be some perceived slowdowns during the refinement of processes, the eventual setup of robust systems enables the regular implementation of data-backed improvements. This iterative approach not only fosters ongoing evolution but also minimises the need for costly, time-consuming projects that may ultimately fall short of their objectives.

Given the dynamic landscape of digital product development and evolving workforce demographics, embracing a continuous improvement mindset is paramount. This ensures organisations remain adaptable and responsive to user needs while delivering optimal service. By committing to perpetual refinement, businesses can navigate shifting trends and maintain relevance in an ever-changing marketplace.



**Leslie  
Rois-Burrows**

HEAD OF DELIVERY,  
GRAPHITE DIGITAL

# Final thoughts

This research highlights the need for increased connection across the pharmaceutical industry to improve the impact of digital solutions and ensure business and customer objectives are being met.

## Starting from the inside out

Start by taking a frank look at the internal culture of your organisation – how easy it is to drive change? How empowered do you feel? Do you think you have a sense of this, or do you really know?

It's not unusual to find a significant disparity between senior team perception and what's actually happening day to day, so it's important to speak to employees across functions and levels. Think peer-led focus groups, stakeholder interviews, and anonymous surveys to uncover what meaningful internal connection looks like. How can enhanced personal relationships enable professional relationships to flourish and deliver results?

## Celebrate action over perfection

Of course, activity will ideally yield results, but when striving for things such as disruption, innovation, and optimisation it's essential to have a culture that genuinely reflects this. This means knowing that gaining insight – whether 'good' or 'bad' – and putting an iterative, unpolished product in front of real users for feedback is more important than standing still for months on end.

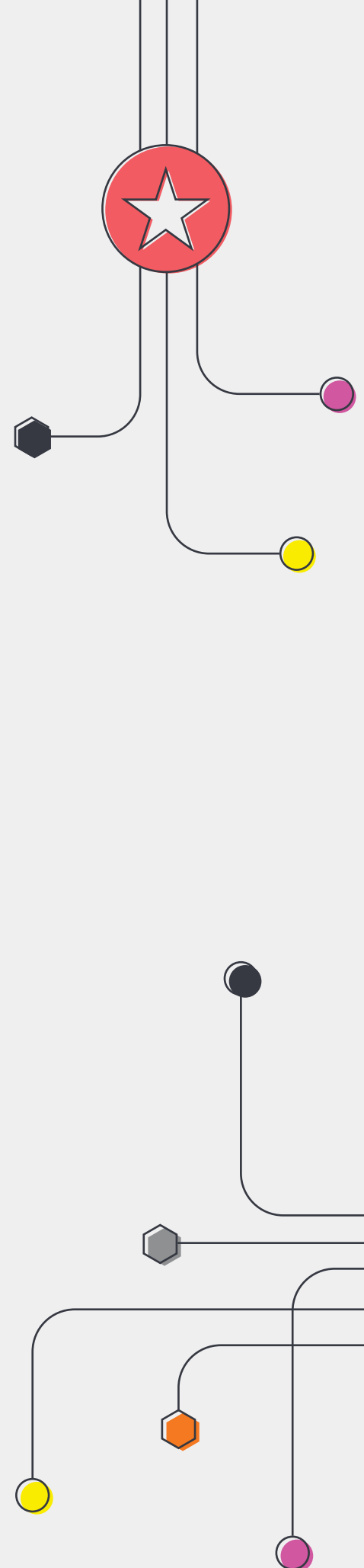
We can continue to optimise, learn and create high-performing iteration cycles but we need to champion action, bold moves, and building teams that are motivated to push boundaries and challenge the status quo. The more organisations can understand how actual users are engaging with them through various experiments, the more they can respond and enhance those experiences to drive better results.

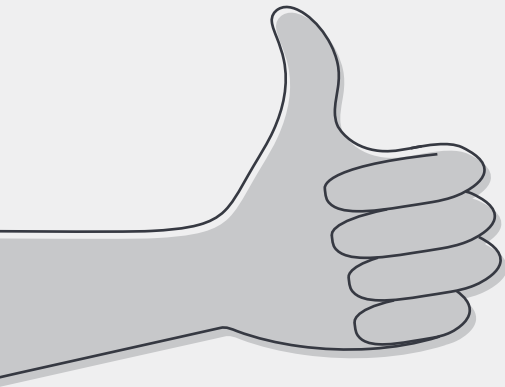
## Hearts before minds

What does it truly mean to connect? Marketing textbooks stress the importance of "right message, right place, right time", and yes, omnichannel strategies need to factor this in, but truly connecting with someone means establishing a genuine and meaningful relationship with them.

This goes beyond superficial interactions and involves understanding, empathy, and mutual respect. To build this, leaders should ask themselves – when did I last speak to a customer, or review first-hand customer research or data?

Organisations cannot claim to understand their customers without this – they are individuals and expect the same emotional intelligence from engagements with pharma and healthcare providers as they do in other aspects of their lives. If companies make assumptions, overgeneralise,





rely on outdated research or internal points of view, they are doing their customers a disservice.

However, if organisations get this right, and have the right data strategy in place to facilitate considered connections, they can develop meaningful bonds with their customers and start to facilitate trust, laying the foundations for loyalty.

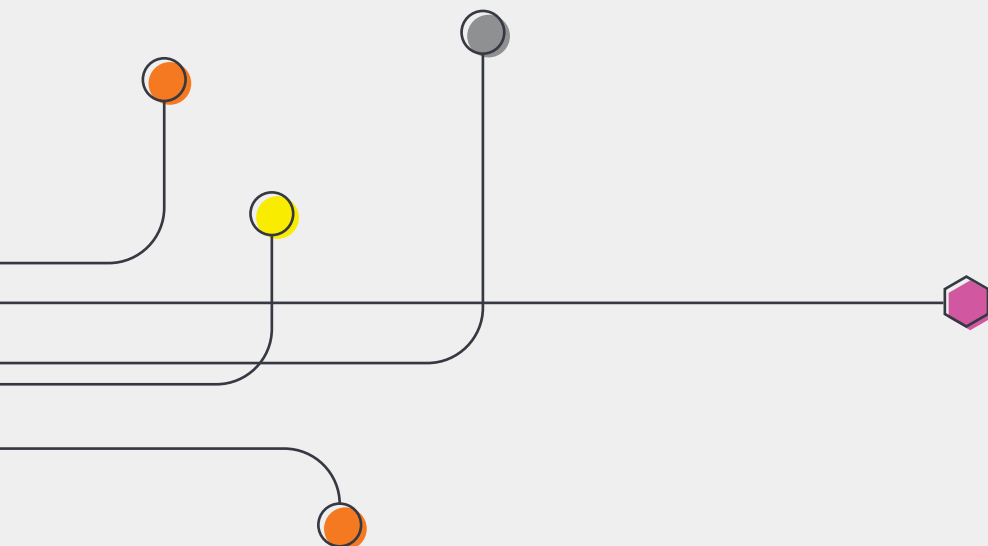
### **What can you do today?**

There are lots of big questions and ideas here, but what should teams do right now?

The first stage of growth is always about taking stock, looking at where you are today, and where you want to get to. Then, you can form a plan for how to get there. Think about how your digital strategies are performing, and how connected you are across departments, functions and markets.

Ascertain whether there are other like-minded people that you can collaborate with on this mission, who can help you communicate value and get the wider business to care about the initiative. Demonstrate how enhanced connection can show a return on investment within your organisation – think more collaborative teams responding more effectively to customer needs, driving higher engagement, and triggering enhanced conversion metrics.

Review and score your current capability in detail and map this out visually, possibly comparing against competitors and looking outside of the industry for inspiration. Consider key pillars such as internal culture, technical capability, data capability, first-hand customer research, platform engagement and performance, processes, skillsets and resources, and optimisation frameworks.





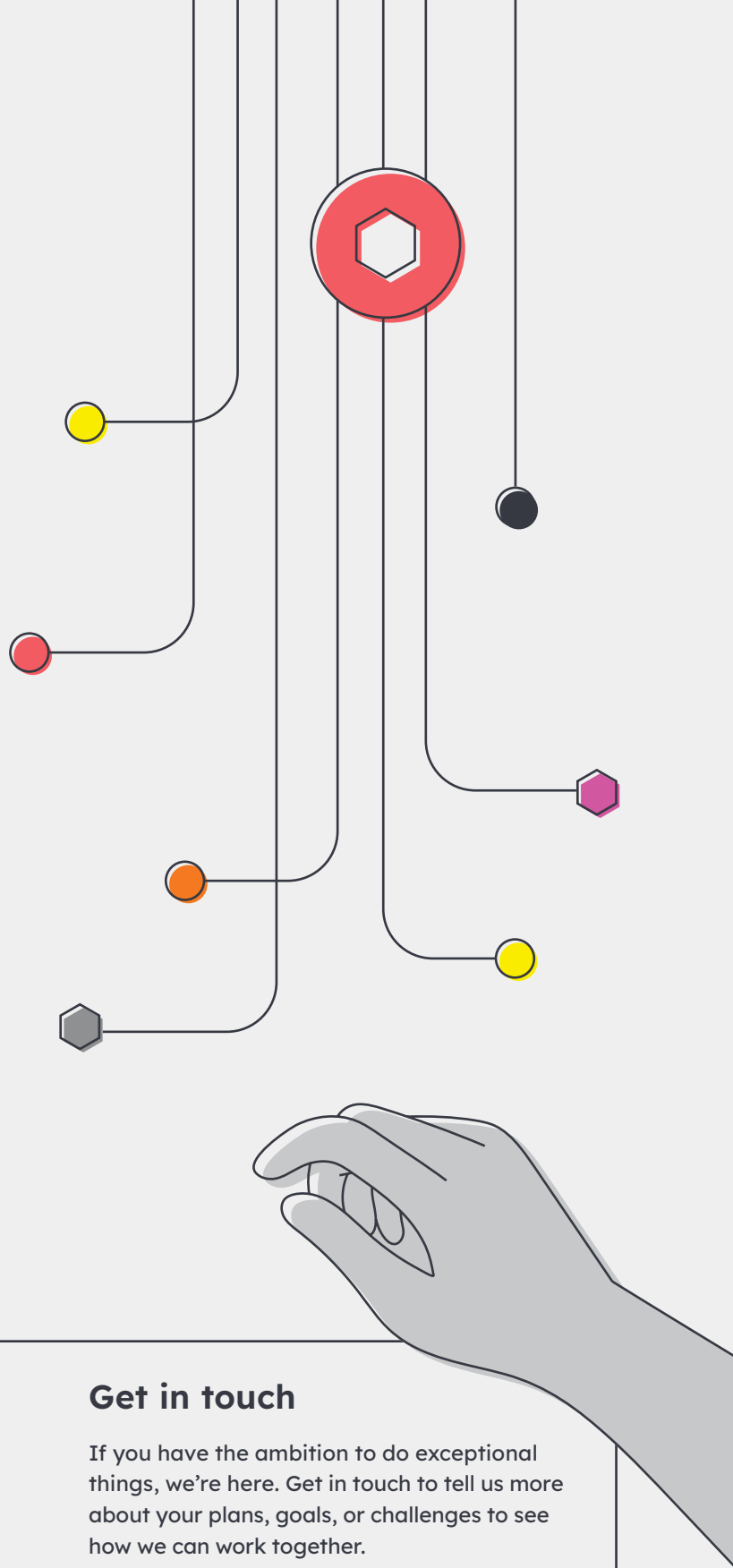
# About Graphite

## The health and pharma digital experience agency

We are a dedicated Health and Pharma digital experience agency, creating solutions that result in a positive, measurable impact on people's health and wellbeing.

Whether Patients, Healthcare Professionals, or Consumers, we deep dive into peoples' emotional needs and behaviours to deliver innovative digital solutions that will keep them coming back. Our unique approach blends strategy, research and human-centred design to create digital experiences with purpose.

Working across Omnichannel Experience and Digital Health, we bring the voice of the customer into the design process to ensure your products meet their needs whilst driving positive results for your business.



### Our services

- Digital Product and UX Strategy
- Clinical UX Research
- Digital Product and Experience Design

### Trusted by



### 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](mailto:contact@graphitedigital.com)  
[graphitedigital.com](http://graphitedigital.com)

- [graphite-digital](#)
- [wearegraphite](#)
- [wearegraphite](#)

# Our contributors and partners

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.

## Andrew Binns

HEAD OF DIGITAL AND INNOVATION,  
ASTRAZENECA

## Global Digital HCP Engagement Lead

AT TOP 10 GLOBAL PHARMA ORG

## Paul Simms

CHIEF EXECUTIVE, IMPATIENT HEALTH

## Sarah Christensen

NORDIC DIGITAL DIRECTOR, NOVARTIS

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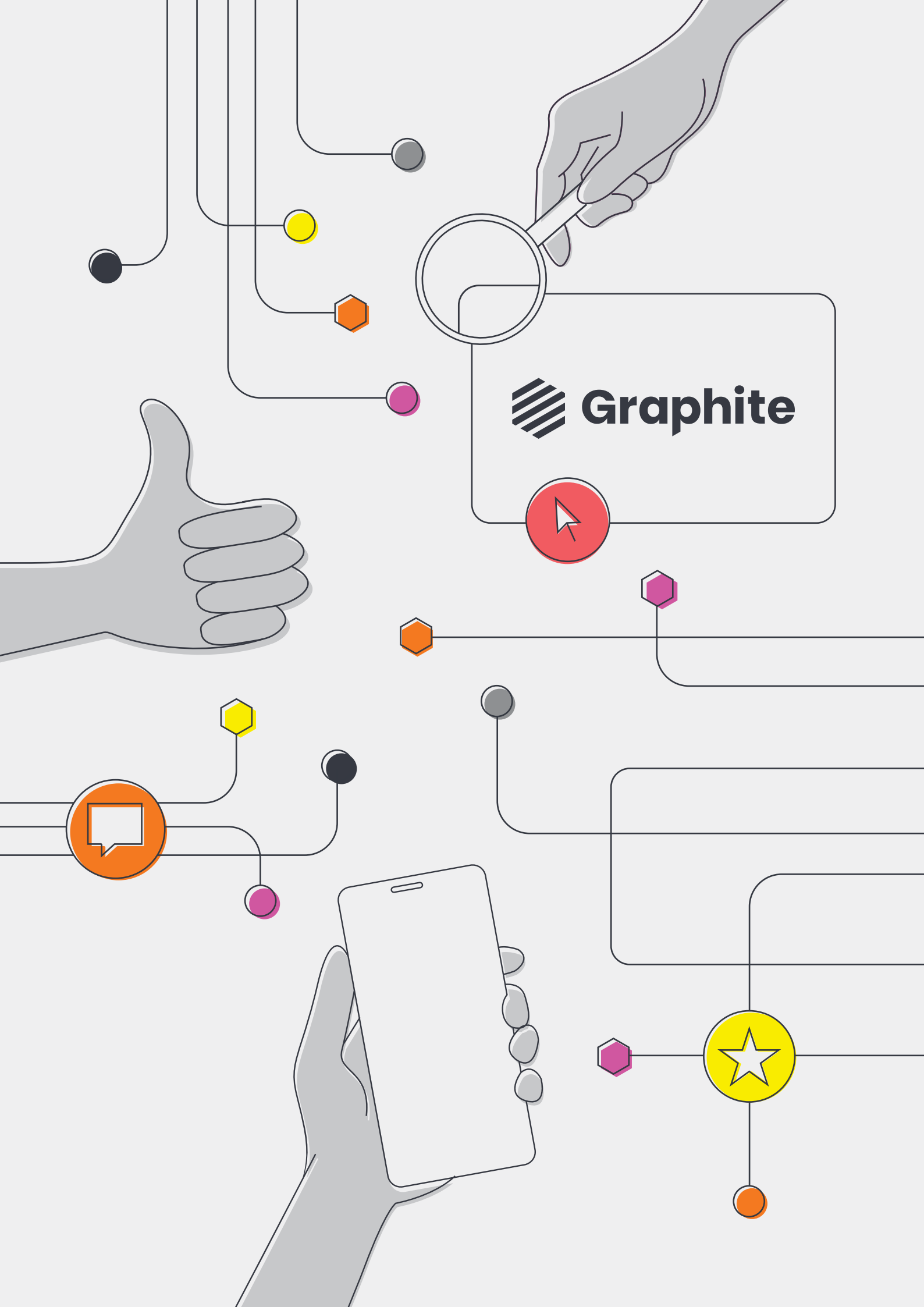
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The survey data referenced in this paper was sourced by WBR Insights on behalf of Graphite Digital. The final report was compiled and written solely by Graphite, and the information and opinions within reflect that.

Graphite would like to thank WBR Insights for their primary research efforts that went into gathering the data to make this report possible.



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