Leading the Customer Experience in the

Healthcare and Life Sciences Sector

Findings from 215 healthcare and life sciences marketing leaders worldwide

A Note from Salesforce Industries

The healthcare and life sciences landscape is undergoing rapid regulatory, market, and technology changes, and healthcare consumers have higher expectations than ever before. We surveyed 215 healthcare and life sciences marketers to learn more about how they're responding to the exacting demands of today's connected and empowered customers.

Ultimately, patients and health plan members are no different from customers in any industry; they want to feel known, remembered, and understood by businesses. They're always connected, and they expect seamless interactions across every channel and device.

As marketers in the age of the connected customer, it's our job to put the healthcare consumer at the center of everything we do. We must consider the moments that matter most – every touchpoint in which we can make an impact – and change how we apply all the tools available to us. No two patients undergo the same wellness journey, so your messages to them as customers should be as unique as they are. Now, more than ever, these

1-to-1 communications are an expected standard. As you review the following research, you'll notice that high-performing healthcare and life sciences marketing teams are focusing on building personalized relationships across every touchpoint to create cohesive customer journeys. We identified high-performing marketers as those who are extremely satisfied with the current outcomes realized as a direct result of their company's marketing investment. For more information about high, moderate, and underperformers, see page 22.

Today, your marketing organization has an unprecedented opportunity to lead your business forward. We hope you'll use the findings in this report as a guide in shaping exciting new experiences for your customers.
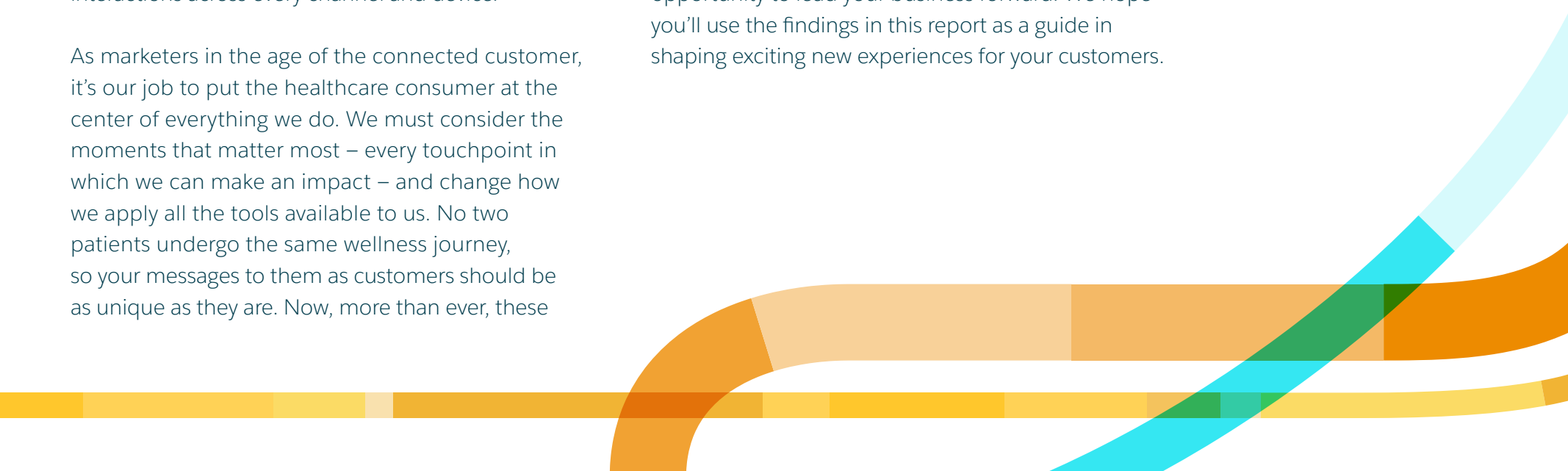
Introduction

It's no surprise that today's consumers expect more from their customer experiences. Empowered by technology, they have access to more choices and conveniences. Social networks give them a powerful platform for sharing their experiences – both positive and negative. To attract and retain customers, leading businesses are weaving cohesive, tailored customer journeys that are based on individual preferences and needs.

But engagement with healthcare consumers lags behind. For patients and health plan members, a typical interaction includes reaching out by phone, getting transferred, scheduling appointments many weeks in advance, and waiting for the provider – without knowing how much it will cost. Interacting with pharmaceutical and medical device companies adds another layer of complexity, since many patients must coordinate their own care and payments. However, changing regulations – such as value-based reimbursements – mean that payers, providers, and life sciences companies are beginning to rethink the way they interact with patients and members.

In fact, many leading healthcare organizations now refer to patients and members as customers, and they rely on the marketing organization to lay a strong foundation for the care journey. This new marketing paradigm requires agility and deep understanding of the patient as a customer, as well as his or her entire ecosystem, which is often composed of family members, proxy caregivers, and other health and wellness professionals.

To understand how leading healthcare organizations market to customers, Salesforce conducted a survey of 215 marketing leaders in the healthcare and life sciences sector worldwide.[1] This research shows how healthcare and life sciences marketing teams are going beyond traditional customer outreach to create personalized, 1-to-1 journeys that engage customers at every step of their healthcare experience.

As consumers become used to exceptional customer service, they will expect more from healthcare – and healthcare organizations that understand the new marketing paradigm will be best positioned to capture this opportunity.

[1] "2016 State of Marketing," March 2016, Salesforce Research. Data includes 215 marketing leaders in the healthcare and life sciences sector worldwide.

Finding 1
Employing Lean, Agile Methodologies Increases Effectiveness

**How are marketers keeping pace in the age of the connected patient?**
Top marketers are applying lean, agile methodologies to their marketing approach, allowing them to quickly pivot to the customer's needs at every interaction.

High-performing healthcare and life sciences marketers are 5x more likely to rate their marketing agility as excellent compared to moderate-performing and underperforming teams.

Employing Lean, Agile Methodologies Increases Effectiveness
Top marketers understand that to stay ahead of their customers' dynamic and ever-changing expectations, they must embrace lean, agile methodologies. High performers are 5x more likely than moderate-performers and underperformers to rate their marketing agility as excellent.

Percentage Who Rate Their Marketing Agility as Excellent

70%

14%
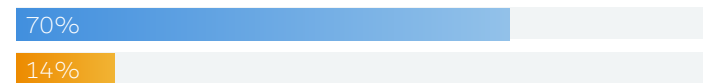
Percentage Who Employ Lean, Agile Methodologies
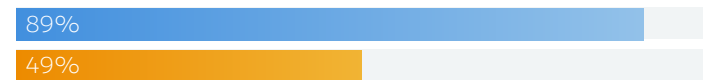
89%

49%

■ High-Performing teams

■ Moderate-Performing and Underperforming teams

High-Performing vs. Moderate-Performing and Underperforming Teams

5x
more likely to rate their marketing agility as excellent

1.8x
more likely to employ lean, agile methodologies

Finding 2
## Top Marketers Are Leading Customer Experience Initiatives

Most healthcare interactions live outside of marketing's realm, in either patient care or support. However, top marketers strive to elevate the patient's customer experience by delivering a single, shared view of the customer across the entire business.

High-performing marketing teams are at least 3x more likely than moderate performers and underperformers to strongly agree they own the customer experience and digital transformations across the business.

Top Marketers Are Leading Customer Experience Initiatives

Top healthcare and life sciences marketers are the leaders of cross-organizational customer experience initiatives.

Percentage Who Strongly Agree They Are Leading Customer Experience Initiatives across the Business

65%

22%
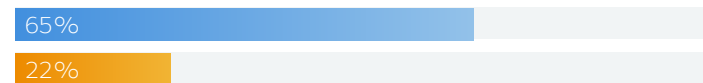
Percentage Who Strongly Agree They Are Implementing Digital Transformations across the Company
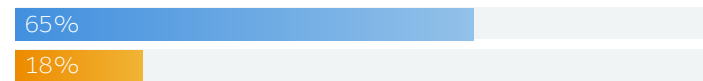
65%

18%

■ High-Performing teams

■ Moderate-Performing and Underperforming teams

High-Performing vs. Moderate-Performing and Underperforming Teams

3x
more likely to strongly agree

3.6x
more likely to strongly agree

Finding 3
Marketers Elevate Customer-Focused Metrics

Core business metrics – like customer satisfaction – are moving closer to the realm of the CMO, blurring lines between marketing, patient services, and sales. Healthcare marketing is more about building advocacy and sustaining lifetime customer loyalty, rather than merely filling the funnel. Marketing success measures and priorities now reflect the rising emphasis on the customer experience.

Customer Satisfaction Is a Top Measure of Success
Revenue growth is still the top measure of success for the healthcare and life sciences sector, but it's closely followed by customer satisfaction.

Revenue growth	37%
Customer satisfaction	34%
Customer acquisition	31%

Marketing leaders in the healthcare and life sciences sector rate creating higher levels of customer engagement a top priority, indicative of the growing importance of creating personalized, 1-to-1 experiences at every step of a customer's journey to optimal care.
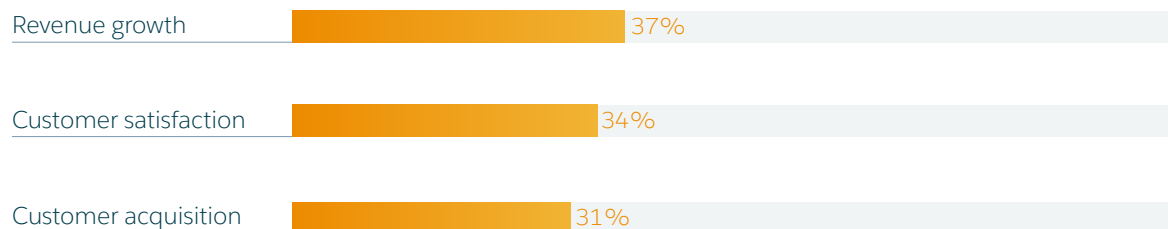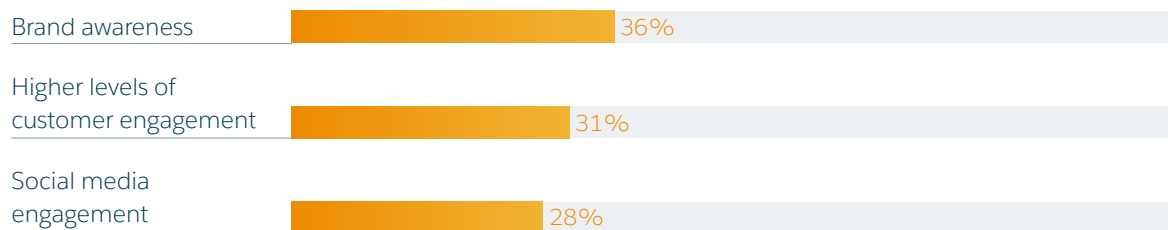
Marketers Make Customer Engagement a Top Priority
Brand awareness has been a goal since the early days of marketing. However, customer engagement is a new focus as healthcare marketers strive to create a personalized customer experience.

|	
Brand awareness	36%
Higher levels of customer engagement	31%
Social media engagement	28%

Finding 4
Social and Advertising Claim Top Spots for Spending Growth

Marketers understand that they need to meet healthcare consumers wherever they are. To that end, healthcare marketers are focused on listening to and engaging with customers on social media channels, publishing social content, and analyzing social data. They've discovered that social media marketing provides a unique opportunity for educating consumers about public health concerns, giving healthcare brands a personal voice, and providing in-depth health-related videos, product demos, and other educational content. With the right tools, marketers can even execute their social strategy in real time and entirely from their mobile devices.

Social and Advertising Claim Top Spots for Spending Growth
Healthcare marketers are prioritizing social media to meet their customers where they are. Social media is among the top marketing channels for increased spending.

Percentage Who Are Increasing Spending in Each Area over the Next 12 Months
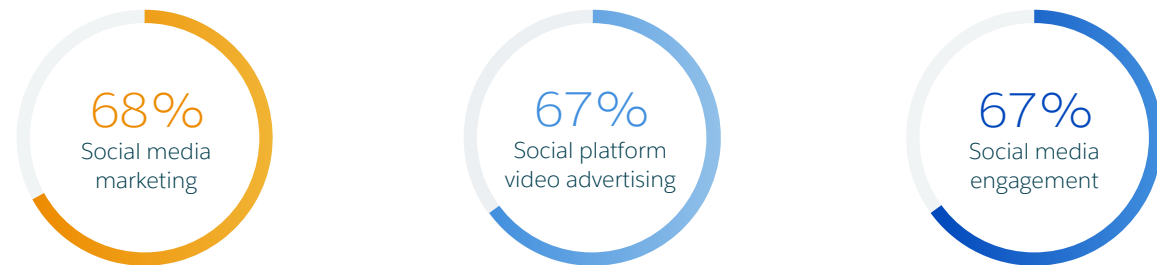
68%
Social media marketing

67%
Social platform video advertising

67%
Social media engagement

Data reported in this section comes from a base of respondents who use each of the corresponding digital marketing channels.

Finding 5
## Collaboration Is Key to a Stellar Customer Experience

Leading the customer experience initiative requires company wide support and collaboration. Top teams have shifted to building bridges among departments with the goal of ensuring a holistic customer experience.

Top performers make it a priority of the entire company to unify marketing, patient care, support, and all other touchpoints in the patient's customer journey to provide a truly seamless and personalized omni-channel experience.

Collaboration Is Key to a Stellar Customer Experience

The most successful marketing leaders are working across business units to deliver a personalized omni-channel experience for customers.

Percentage Who Excel at Collaborating with Other Business Units

78%
19%
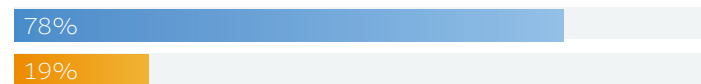
Percentage Who Excel at Creating Personalized Omni-Channel Customer Experiences across All Business Units
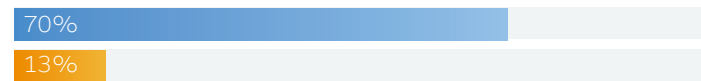
70%
13%

■ High-Performing teams
■ Moderate-Performing and Underperforming teams

High-Performing vs. Moderate-Performing and Underperforming Teams

4.1x
more likely to rate their ability as excellent

5.4x
more likely to rate their ability as excellent

Finding 6
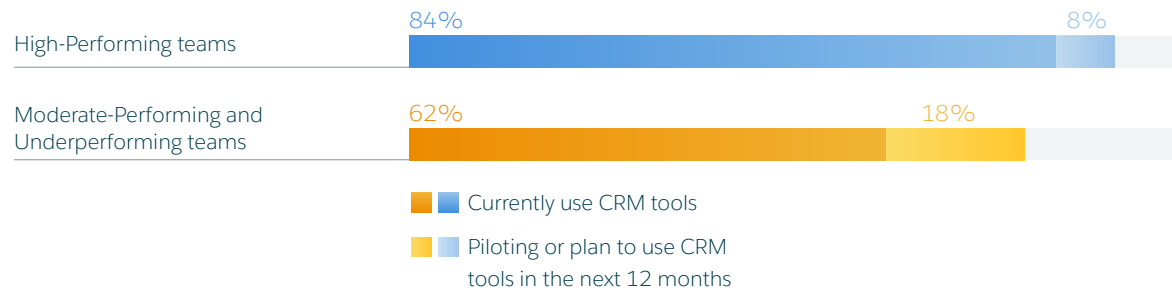## Marketers Lean on CRM Tools to Manage the Patient Relationship

To boost collaboration, healthcare marketers need to deploy the right tools and technology. CRM systems have traditionally been thought of as a sales-only tool; however, they have the infrastructure to securely simplify complex patient information such as EMRs and EHRs, provide an internal hub for coordinated care, and integrate digital marketing, clinical trials, and more for a 360-degree view of the patient.

In fact, two-thirds of all healthcare marketing leaders use CRM tools as part of their toolkit. For example, CRM can help teams develop messages to encourage populations at risk for colon cancer to schedule a colonoscopy – and to determine the appropriate channels to deliver these messages to each recipient.

Marketers Lean on CRM Tools to Manage the Patient Relationship
Since a single visit is only a small part of the patient journey, it's increasingly important for business units to have integrated tools that seamlessly sync with one another to holistically manage the patient relationship.

Percentage Who Use or Plan to Use CRM Tools

High-Performing teams: 84%   8%

Moderate-Performing and Underperforming teams: 62%   18%

■ Currently use CRM tools

■ Piloting or plan to use CRM tools in the next 12 months

Finding 7
Leaders Harness Integration to Create a Single View of the Customer

A single patient view has long been the holy grail of healthcare organizations. Slightly more than half of healthcare marketers agree they have integrated their business systems to create a complete, all-encompassing view of the customer.

Leaders Harness Integration to Create a Single View of the Customer

Top healthcare marketers don't see channel integration as a barrier and are more likely to excel at creating a single view of the customer across the entire business, while moderate-performing and underperforming teams struggle to reach a single view of the customer.

Percentage Who Strongly Agree They Have Integrated Business Systems to Create a Single View of the Customer
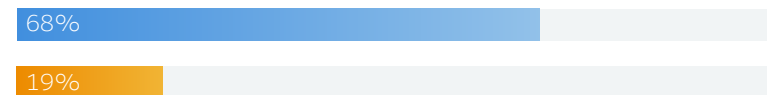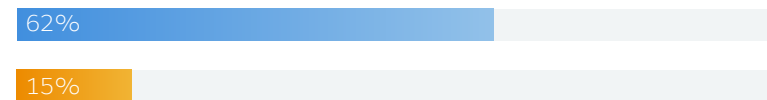
68%

19%

Percentage Who Excel at Creating a Single View of the Customer

62%

15%

■ High-Performing teams

■ Moderate-Performing and Underperforming teams

High-Performing vs. Moderate-Performing and Underperforming Teams

3.6x
more likely to strongly agree

4.3x
more likely to rate their ability as excellent

Finding 8
Top Healthcare Marketing Teams Commit to the Customer Journey

While companywide collaboration and deploying the right tools create a solid foundation for success, top marketers understand that to effectively lead customer experience initiatives across the business, they must adopt a customer journey strategy.

Seventy-one percent of healthcare and life sciences marketers agree that a customer journey strategy is critical to the success of their overall marketing strategy.
Whether a marathon or a series of sprints, the well-executed journey must be timely and personalized to individual healthcare consumers.

Top Healthcare Marketing Teams Commit to the Customer Journey
From adopting strategy to actively mapping touchpoints, high-performing marketing leaders have made the customer journey a priority.

Percentage Who Strongly Agree They Have Adopted a Customer Journey Strategy as Part of Their Overall Business Strategy

81%

25%
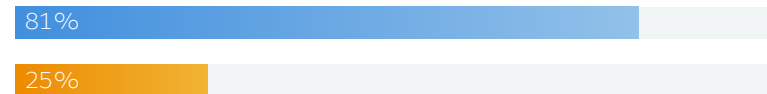
Percentage Who Strongly Agree They Are Actively Mapping the Customer Journey

76%

20%

■ High-Performing teams

■ Moderate-Performing and Underperforming teams
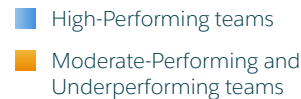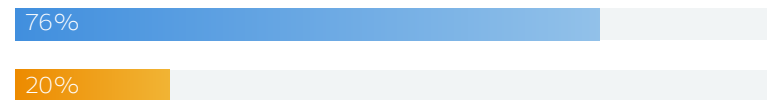
High-Performing vs. Moderate-Performing and Underperforming Teams

3.2x
more likely to strongly agree

3.7x
more likely to strongly agree

Finding 9
Customer Journey Adoption Drives Powerful, Positive Results

Of marketers who have implemented a customer journey strategy, nearly two-thirds agree that it has had a positive impact on their business. Seventy-one percent of marketing leaders have seen a positive impact on their customers' willingness to recommend products or services, and about the same percentage (73%) agree th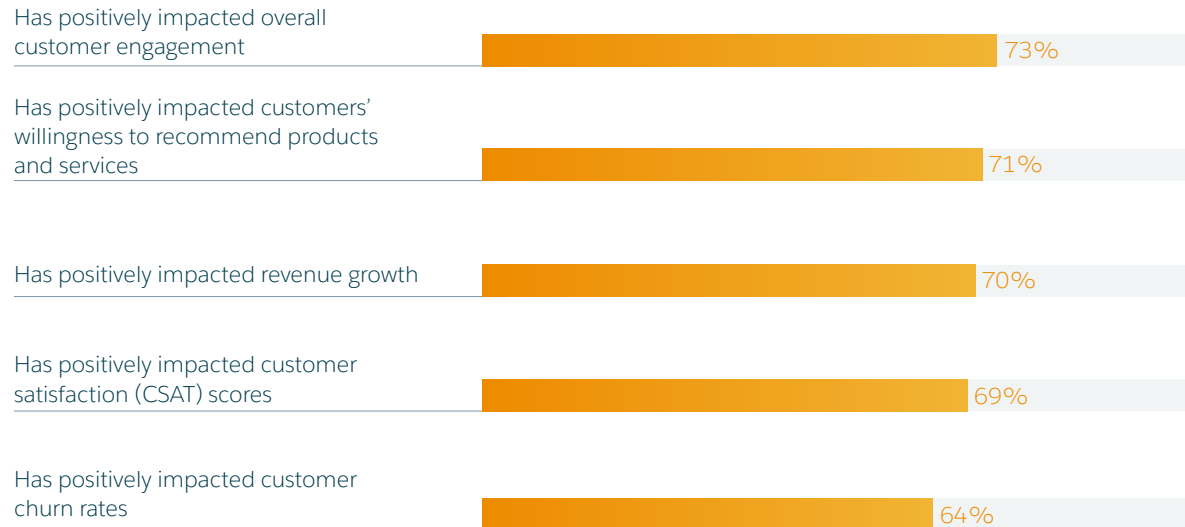at a customer journey strategy has positively impacted overall customer engagement – the second biggest priority for healthcare and life sciences marketers this year.

Customer Journey Adoption Drives Powerful, Positive Results

Adopting a customer journey strategy has overwhelmingly positive business impacts for the majority of marketing leaders.

Percentage Who Have Adopted a Customer Journey Strategy and Strongly Agree or Agree with Each Statement

Has positively impacted overall customer engagement — 73%

Has positively impacted customers' willingness to recommend products and services — 71%

Has positively impacted revenue growth — 70%

Has positively impacted customer satisfaction (CSAT) scores — 69%

Has positively impacted customer churn rates — 64%

Finding 10
High Performers Invest in the Right Tools and Technology

Technology and tools attract larger investments than other areas of spending by healthcare and life sciences companies. **Among all healthcare marketers, 66% will increase spending on marketing tools and technology over the next two years.**

High Performers Invest in the Right Tools and Technology

More than half of top healthcare marketers will be substantially increasing marketing tools and technology spending to stay on trend in the ever-changing marketing industry.

Percentage Who Are Substantially Increasing Spending on Marketing Tools and Technology over the Next Two Years

51%

18%

■ High-Performing teams

■ Moderate-Performing and Underperforming teams
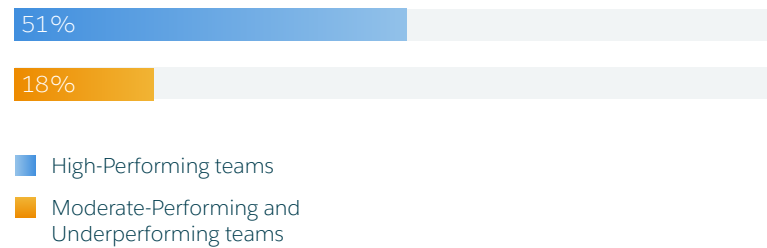
High-Performing vs. Moderate-Performing and Underperforming Teams

2.9x
more likely to substantially increase spending on marketing tools and technology

Finding 11
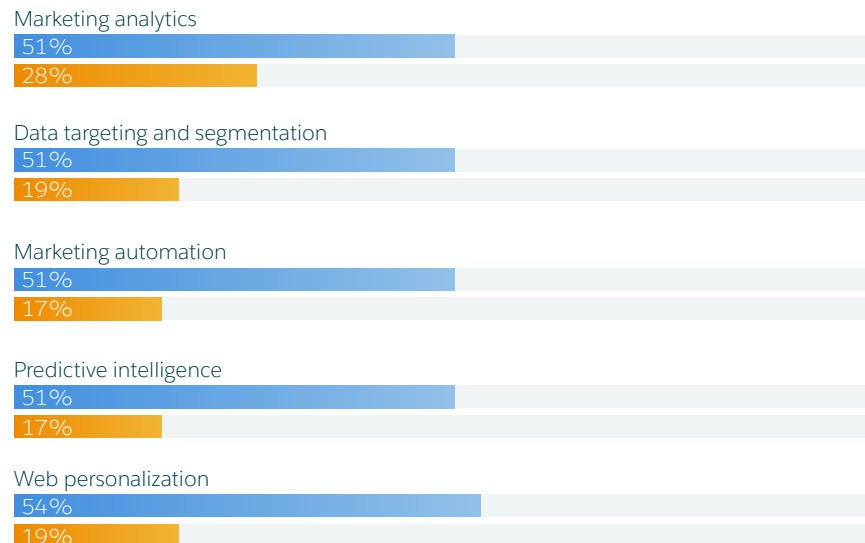## Marketers Using Advanced Technologies Reap the Benefits

High-performing marketing teams are not only using more technology, they're notably using more advanced types – like predictive intelligence – to make it easier to track customer behavior and use those data-driven insights to create highly personalized interactions. Real-time collection of customer data, even if it's anonymous, allows marketers to apply what they know about individuals to tailor the online customer experience.

Marketers Using Advanced Technologies Reap the Benefits

Technology is changing the way healthcare marketers can communicate with patients. Top performers are significantly more likely to extensively use advanced tools and technologies; however, nearly all marketers who use these technologies report high effectiveness.

Percentage Who Are Extensively Using Each Tool or Technology

Percentage Rating Each Tool or Technology Very Effective or Effective

Marketing analytics
51% — 90%
28% — 71%

Data targeting and segmentation
51% — 84%
19% — 71%

Marketing automation
51% — 87%
17% — 69%

Predictive intelligence
51% — 94%
17% — 70%

Web personalization
54% — 91%
19% — 63%

■ High-Performing teams

■ Moderate-Performing and Underperforming teams

Finding 12
Emerging Marketing Technology Is Proving Worthy of Investment

Healthcare marketers who adopt new technologies for creating seamless customer relationships are getting ahead of customers' future needs. These high performers are reporting higher customer engagement with adoption of technologies like the internet of things (IoT), beacon technology, podcasting, and wearables.

For example, health plans can use fitness and wellness data that's securely collected from wearables, scales, and other health monitoring devices to provide personalized rewards and offers that motivate patients to make better healthcare choices and be more proactively engaged in their own health decisions.

Emerging Marketing Technology Is Proving Worthy of Investment

Marketers who are pioneering with wearables, beacon technology, podcasting, and the internet of things are seeing phenomenal results.

Percentage Who Are Extensively Using Each of the Following

Percentage Rating Each Tool or Technology Very Effective or Effective

Internet of things (IoT)

49% — 87%
13% — 70%

Proximity marketing using beacon technology
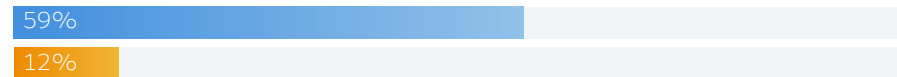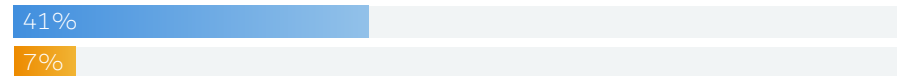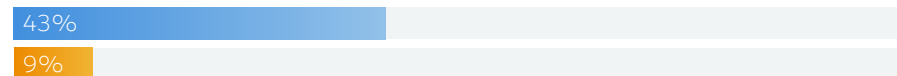
59% — 88%
12% — 52%

Podcasting

41% — 84%
7% — 55%

Wearables

43% — 96%
9% — 60%

■ High-Performing teams

■ Moderate-Performing and Underperforming teams

Finding 13
Executive Team Commitment Makes a Difference

The world's best healthcare marketing teams have buy-in from their executive teams. **The highest-performing marketing teams are 2.8x more likely than moderate performers and underperformers to say their executive team is completely committed to supporting the overall marketing strategy.**

Executive Team Commitment Makes a Difference

High-performing marketing teams are supported from the top down. Eighty-one percent of top teams have their executive team's complete commitment to their marketing strategy.

High-Performing teams

Moderate-Performing and Underperforming teams

High-Performing vs. Moderate-Performing and Underperforming Teams

2.8x

more likely to say their executive team is completely committed to the overall marketing strategy

10%

20%

30%

40%

50%

60%

70%

80%

81%

29%
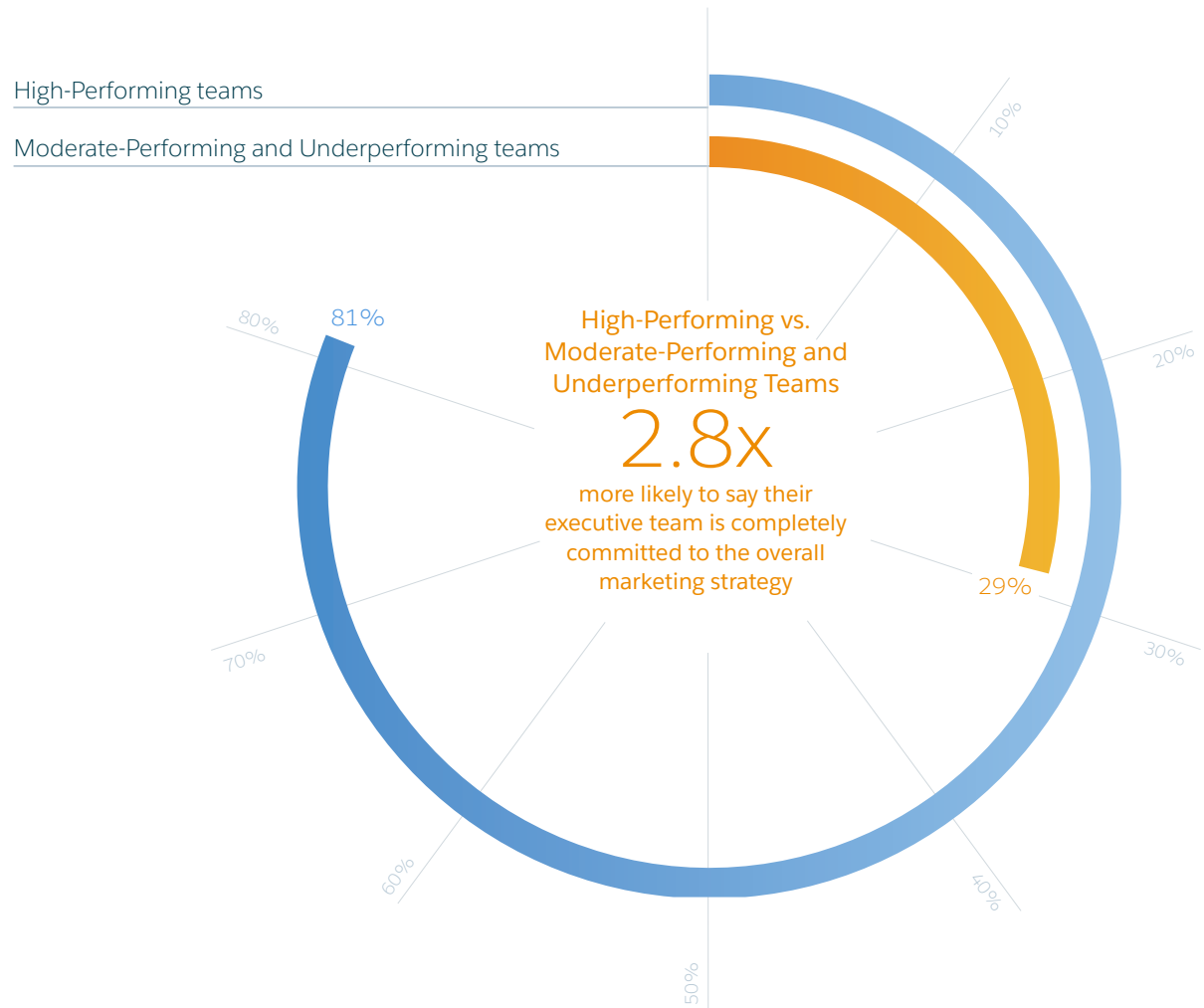
Finding 14
Leaders Are Taking a Cross-Channel Approach

Healthcare consumers expect to have access to medical information wherever and whenever they need it. Technology is blurring the lines of the digital and physical worlds, so marketers must execute their strategies across channels.

In fact, 71% of all healthcare and life sciences marketers tie advertising on social platforms to their mobile marketing efforts – a perfect example of this cross-channel convergence.

Leaders Are Taking a Cross-Channel Approach

Two-thirds of high performers have integrated their mobile, social, and email strategies into their overall marketing strategy, whereas only a quarter of moderate-performing and underperforming teams have done so.

High-Performing vs. Moderate-Performing and Underperforming Teams
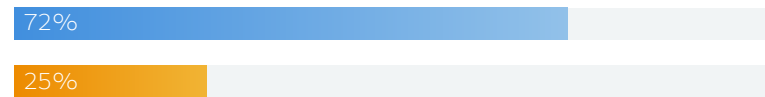
Percentage Who Strongly Agree They Have Integrated Their Mobile Marketing Strategy into Their Overall Marketing Strategy

72%

25%

2.9x
more likely to strongly agree

Percentage Who Strongly Agree They Have Integrated Their Email Marketing Strategy into Their Overall Marketing Strategy

66%

24%

2.7x
more likely to strongly agree
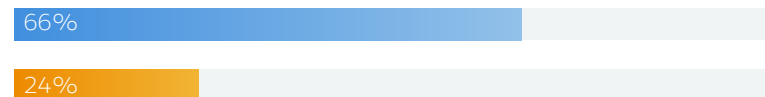
Percentage Who Strongly Agree They Have Integrated Their Social Marketing Strategy into Their Overall Marketing Strategy
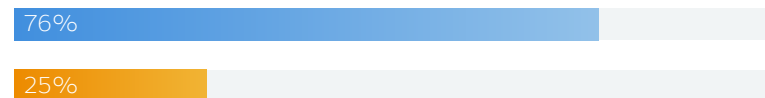
76%

25%

3x
more likely to strongly agree

■ High-Performing teams

■ Moderate-Performing and Underperforming teams

* Data reported in this section comes from a base of respondents who use each of the corresponding digital marketing channels.

Scorecards

The following scorecards provide a quick
snapshot of how healthcare and life sciences
marketers use various digital channels to create
a cohesive, 1-to-1 customer experience.

Mobile Scorecard*

Our world is highly connected – with smartphones, third-party apps, and more. Savvy healthcare marketers are leveraging this new normal by creating dynamic experiences for patients via mobile apps, text messaging, and other techniques.
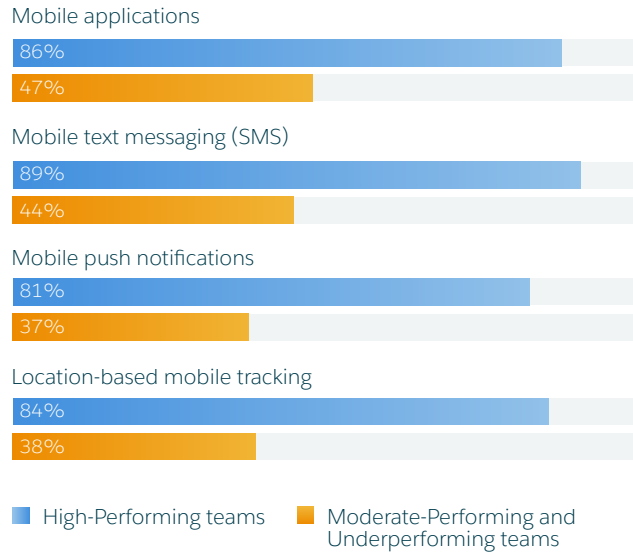
Percentage Currently Using Each Mobile Channel

Mobile applications
86%
47%

Mobile text messaging (SMS)
89%
44%

Mobile push notifications
81%
37%

Location-based mobile tracking
84%
38%

■ High-Performing teams　　■ Moderate-Performing and Underperforming teams

High-Performing vs. Moderate-Performing and Underperforming Teams

1.9x
more likely to currently use

2x
more likely to currently use

2.2x
more likely to currently use

2.2x
more likely to currently use

To create more intimate customer connections, marketers in the healthcare and life sciences sector are using advanced mobile techniques such as deep links that drive users directly to the app store to download their app.

*Data reported in this section comes from a base of respondents who use each of the corresponding digital marketing channels.

Percentage Who Use Each Mobile Strategy
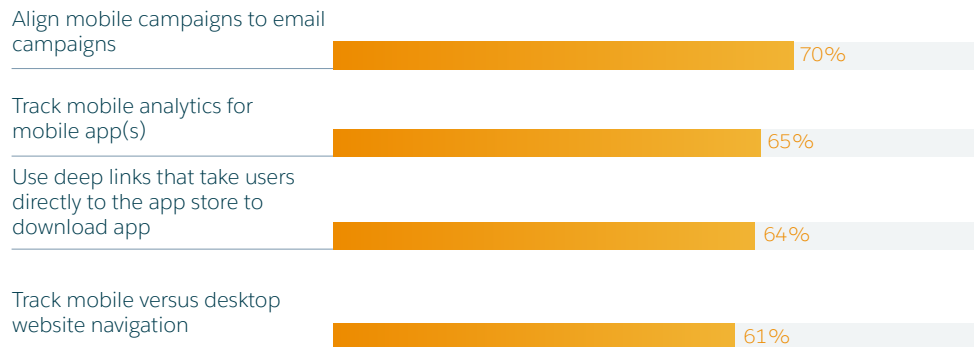
Align mobile campaigns to email campaigns
70%

Track mobile analytics for mobile app(s)
65%

Use deep links that take users directly to the app store to download app
64%

Track mobile versus desktop website navigation
61%

Email Scorecard*

Creating dynamic content via predictive technology is breathing new life into established marketing channels such as email. **Top marketing teams are 2.2x more likely than moderate performers and underperformers to leverage predictive intelligence or data science to create personalized emails.** Gaining a deeper, behavior-based understanding of customers allows marketers to be smarter in creating next steps along the customer journey.

Percentage Who Leverage Predictive Intelligence or Data Science to Personalize Emails

55% — High-Performing teams
25% — Moderate-Performing and Underperforming teams

- High-Performing teams
- Moderate-Performing and Underperforming teams

High-Performing vs. Moderate-Performing and Underperforming Teams

2.2x
more likely to leverage predictive intelligence or data science to personalize emails

Beyond predictive intelligence, top teams are leading the charge, triggering personalized and cross-channel interactions with customers. Email personalization is an integral element in delivering a holistic customer journey and creating close customer relationships.
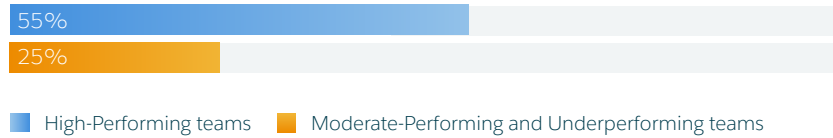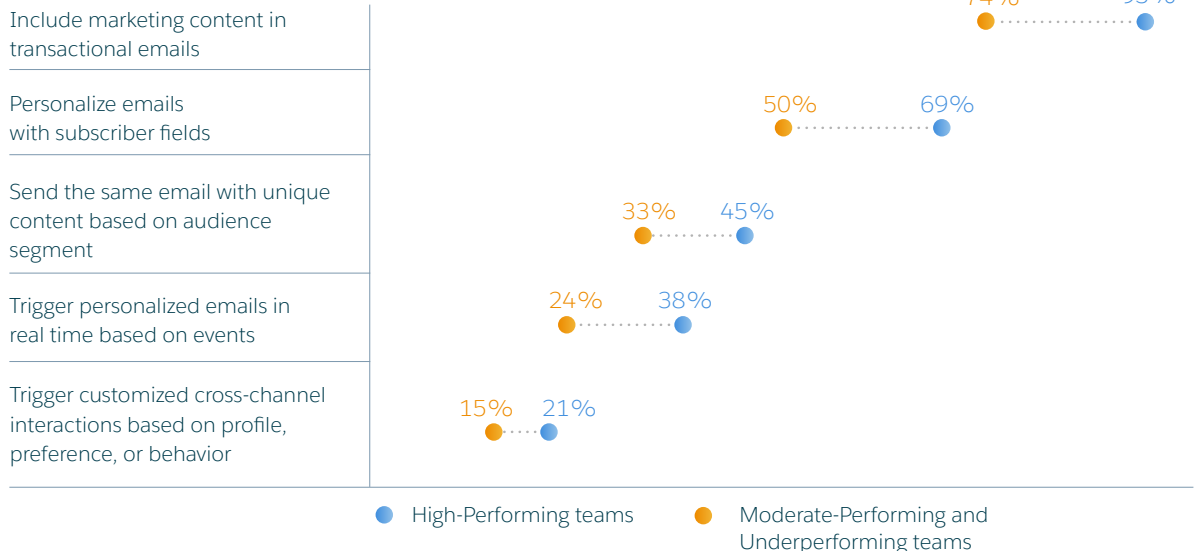
* Data reported in this section comes from a base of respondents who use each of the corresponding digital marketing channels.

Percentage Who Use Each Email Strategy

Strategy	Moderate-Performing and Underperforming	High-Performing
Include marketing content in transactional emails	74%	93%
Personalize emails with subscriber fields	50%	69%
Send the same email with unique content based on audience segment	33%	45%
Trigger personalized emails in real time based on events	24%	38%
Trigger customized cross-channel interactions based on profile, preference, or behavior	15%	21%

- High-Performing teams
- Moderate-Performing and Underperforming teams

Social Scorecard*

Social provides an open platform for two-way communication between healthcare organizations and customers that's hard to replicate on other channels. Top teams understand the need for real-time social communication and engagement and are responding to customer interactions in a timely manner.

Percentage Who Excel at Responding to Social Interactions in a Timely Manner

73%
18%

■ High-Performing teams ■ Moderate-Performing and Underperforming teams
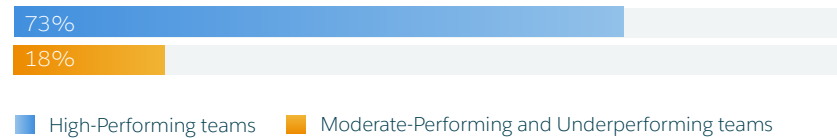
High-Performing vs. Moderate-Performing and Underperforming Teams

4.1x
more likely to be excellent at responding to social interactions in a timely manner

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To influence the conversation and better serve their audience, top marketers are monitoring online conversations that are meaningful to their business. Plus, they're using social publishing tools to effectively manage and create consistent messages across social platforms.

Percentage Who Use Social Listening Tools

86%
52%

Percentage Who Use Social Publishing Tools

81%
54%

■ High-Performing teams ■ Moderate-Performing and Underperforming teams

High-Performing vs. Moderate-Performing and Underperforming Teams

1.7x
more likely to be using social listening tools

1.5x
more likely to be using social publishing tools

Top marketing teams are also aligning their social media marketing strategy with other social activities such as patient services to deliver a seamless patient experience.

Data reported in this section comes from a base of respondents who use each of the corresponding digital marketing channels.

Percentage Who Integrate Social Media Activity into Other Tools and Technology (e.g., CRM)

89%
67%

Percentage Who Align Their Social Marketing Strategy with Other Social Activities (e.g., Customer Service)

89%
67%

■ High-Performing teams ■ Moderate-Performing and Underperforming teams

High-Performing vs. Moderate-Performing and Underperforming Teams

1.3x
more likely to use strategy

1.3x
more likely to use strategy

Advertising Scorecard*

More than two-thirds (66%) of healthcare and life sciences marketers are boosting budgets for advertising on social platforms in 2016, making it the fourth-largest area for increased investment across all digital channels. Top performers are more than twice as likely to be using digital advertising channels compared to moderate-performing and underperforming teams.

Percentage Who Extensively Use Each Advertising Strategy

Advertising on social platforms
- High-Performing teams: 62%
- Moderate-Performing and Underperforming teams: 23%

Display or banner ads
- High-Performing teams: 65%
- Moderate-Performing and Underperforming teams: 26%

Video advertising
- High-Performing teams: 68%
- Moderate-Performing and Underperforming teams: 15%

Native advertising
- High-Performing teams: 43%
- Moderate-Performing and Underperforming teams: 15%

■ High-Performing teams   ■ Moderate-Performing and Underperforming teams

High-Performing vs. Moderate-Performing and Underperforming Teams

2.7x more likely to be extensively using advertising on social platforms

2.5x more likely to be extensively using display or banner ads

4.6x more likely to be extensively using video advertising

2.9x more likely to be extensively using native advertising

Marketers are embracing digital advertising – using demographic, customer, and website activity data to segment or target their ads – to get the biggest return on their investment.

Use customer data (e.g., email or phone data) to segment or target ads
- 69%   92%

Use website activity data (e.g., retargeting cookies) to segment or target ads
- 56%   89%

Use demographic data (e.g., age, gender) to segment or target ads
- 62%   89%

● High-Performing teams   ● Moderate-Performing and Underperforming teams
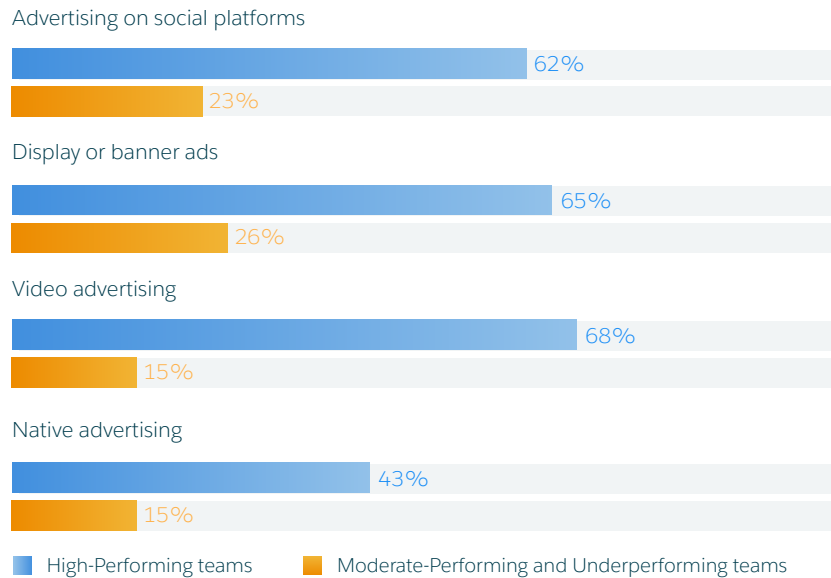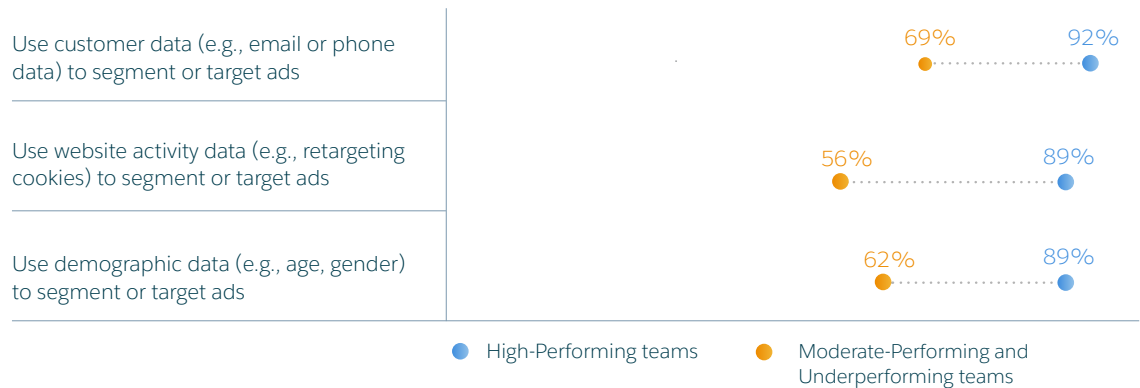
* Data reported in this section comes from a base of respondents who use each of the corresponding digital marketing channels.

Key Takeaways

**1** **Marketers Must Have an Omni-Channel, Customer-First Focus**
Healthcare consumers expect their health and wellness journeys to consist of a series of seamlessly woven experiences and interactions. Regardless of channel, they want every interaction to be known and remembered across the organization. An engagement strategy that integrates multiple channels – from mobile apps, social platforms, and online health records to phone calls and in-person appointments – is the foundation of customer-first engagement. It allows marketers to develop personal, memorable customer journeys, and supports agile marketing programs that can be easily changed as marketers quickly pivot to meet evolving customer needs.

2 **A Single View of the Customer Drives Relevant Customer Journeys**
Evolving to a customer-first marketing focus requires healthcare and life sciences marketers to lead their organizations in delivering a single view of the customer that's shared across the entire business. Top marketing teams are responding by collaborating across departments, business units, and product lines. The result of their efforts is a single version of customer truth that can be used to develop personal, relevant journeys that emotionally connect with customers and increase their loyalty.

3 **Technology Enables Customer-First Marketing**
Technology plays a major role in enabling a more consumer-focused healthcare marketing model. Integrating IT systems and customer data and using marketing automation tools enable marketers to collaborate interdepartmentally, engage across multiple channels, create a single customer view, and develop 1-to-1 customer interactions. Strategic investments in critical systems such as CRM can make it easier for healthcare and life sciences marketers to adapt to new, consumer-focused healthcare delivery models. This includes embracing emerging technologies such as the internet of things and wearables when appropriate.

Data Collection and Methodology

Data is examined relative to business performance to identify patterns for overall success. High-performing marketing leaders are those who are extremely satisfied with the current outcomes realized as a direct result of their company's marketing investment. Due to low base sizes, moderate-performing and underperforming teams were grouped together for purposes of comparison.
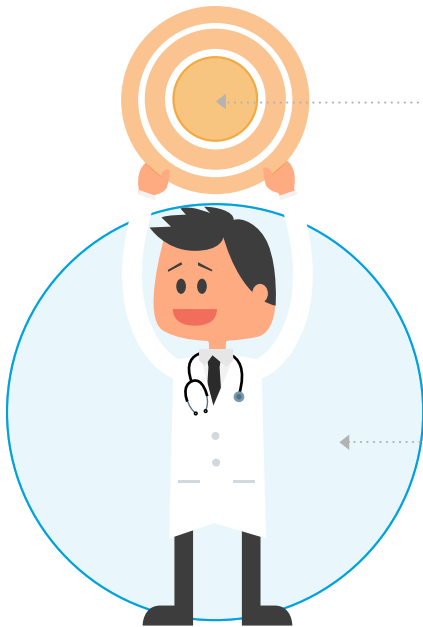
58

119

11

27
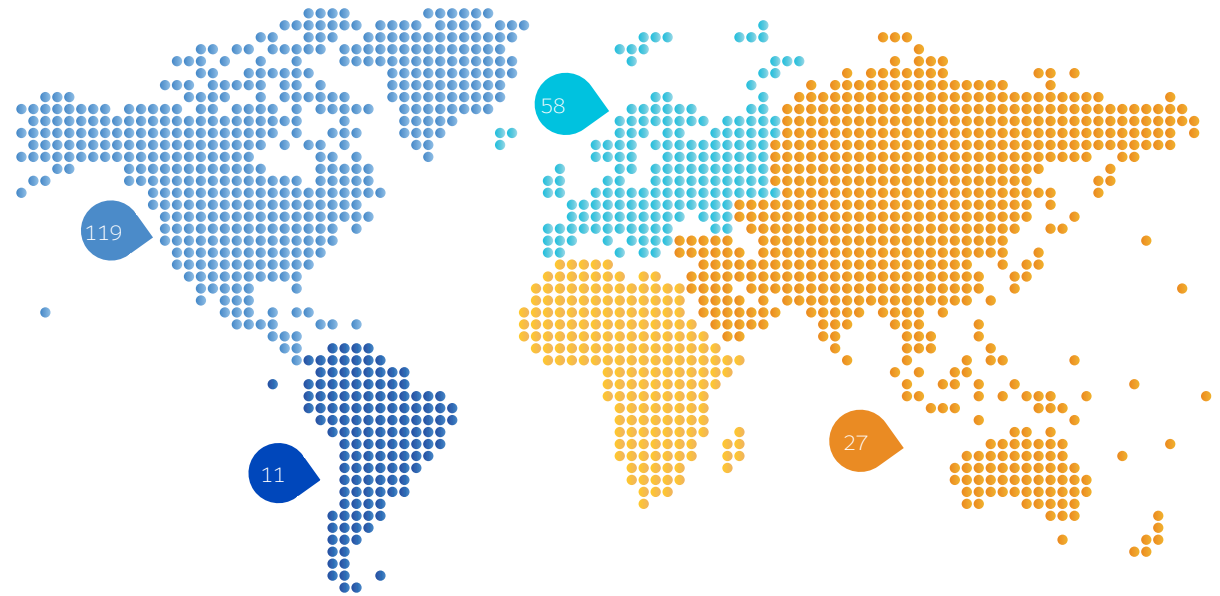
17%

High-Performing teams

are "extremely satisfied" with the current outcomes realized as a direct result of their company's marketing investment

83%

Moderate-Performing and Underperforming teams

are "very, moderately, slightly, or not at all satisfied" with the current outcomes realized as a direct result of their company's marketing investment

salesforce research