# THE DIGITAL ENGAGEMENT ROADMAP

**Customer Engagement Excellence post COVID-19** 

PERSPECTIVE | Pivoting to a new field force game plan

Now that COVID-19 re-shaped both go-to-market strategies as well as on-going customer engagement, it's time to come up with a new approach for developing field teams and enabling them to mean more to their stakeholders in a virtual world. Having a well-defined Digital Engagement Roadmap can help you succeed in the "new normal."



www.claritycx1.com

#### **PREPARE** | Getting the field force ready

Recent surveys indicate that training and coaching field teams virtually can actually lead to better retention and better results. The key is to deliver highly relevant and timely content using **spaced learning journeys**; allowing participants to absorb new learnings in measured doses. With the convenience and cost savings associated with remote learning, organizations can now focus on building and delivering high value content to a wider audience of customer-facing teams.



### Success Story | AisaPac

A Top 5 global pharmaceutical company was preparing to train a field force of 480 in conjunction with a new product launch. When COVID hit, they were able to pivot from live training roll outs to an all-virtual approach in under 30 days. Using virtual breakout rooms and Clarity local language facilitators, participants and their managers engaged in highly interactive sessions and were able to accelerate preparation for field engagement both for the new product and for a wider set of new stakeholders.



## 90% of B2B field forces have transitioned to a virtual

- McKinsey & Co.

#### understand customer needs at the deeper "ecosystem" level are better prepared to generate differentiated client value Learn more here: www.clarityes.com

**Digging Deeper |** Account teams that take the time to

of information is **RETAINED** after 60 days with the spacing effect.

Harvard Business Review

/irtual learning content is tailored to the marketplace & stakeholders.

/irtual learning kicks off with the 1st of several self-paced

modules.

Managers sessions are conducted using digital content tailored for

1st digital "Pulse Check" is initiated to obtain early feedback from

field teams.

of interactive digital "Virtual **Application Clinics**" takes place.

eadership receives 1st dashboard briefing on field force virtual

development

Next set of tailored digital virtual learning content prepared for delivery

Virtual "Spaced Learning" journey continues with next set of content.

#### **ENGAGE** | Meaning more to customers virtually

The conventional wisdom when customers are facing challenging times is that they have no interest in engaging with external providers and partners. Nothing could be further from the truth. The stakeholders in your client accounts are facing a series of changes and need to align with the right solutions and strategies. The key is in teaching account teams how to extract the most valuable insights about their customers BEFORE engaging and then building truly tailored approaches and messages.

of respondents are in the market for B2B products and services, most of whom now have **new** interests due to COVID-19.

Webbiquity

lignment with senior

working.

eadership on their role in

operationalizing new ways of



Customer clicks

A tailored researchcommunication is

based presentation or prepared.

> A Top 10 global pharmaceutical company, growing rapidly through M & A and product pipeline development, was looking for ways to accelerate the expansion of its Hematology business unit. Rapid changes and complexity in the customer ecosystem required an upgraded approach and better extraction of key stakeholder insights. With multiples teams including market access all on the "same page" with a unified account approach, the company is using all-virtual learning settings to solidify this expansion.

Customer

Success Story | US



#### **ENGAGE Learning Sprints:** 1. Leveraging technology

appropriately. 2. Skills for engaging effectively in a virtual setting.

For those that start to engage, tailored digital **Assumptions | Don't** DISCOVERY & assume that your customers VALIDATION begins. are too distracted with COVID-19 to engage with you. Many are seeking solutions to the chalenges the pandemic has generated and conversations with those companies that demonstrate

their ability to stay close to

their customers during this

time will be prioritized.

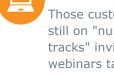
Initial set of communication is crafted using key messages tailored with the deeper insights obtained through spaced learning. Tailoring is done by account archetype and stakeholder



Customer does not click through and communication on Pain Point #2 is sent.



Customer is part of an ABM (Account Based Marketing) "nurture track" woth tailored content by persona and multiple touch points.



Those customers still on "nurture tracks" invited to webinars tailored by persona and pain point.



tailored & personalized email communication

#### **EMBED** | Operationalizing new approaches

One of the positive consequences of field teams working remotely during the pandemic is that managers have a bit more time to devote to coaching and operationalizing the new skills and behaviors developed with spaced learning. After all, if new ways of working are not pulled-through and reinforced, they will quickly fade away. The best performing organizations are using the same tailored approach towards digital coaching, strategic account planning and peer driven insights and feedback.

Managers get

their own

Coaching &

Embedding

"playbook.'

revenue for organizations that embed systematic

- Integrity Solutions



Busines/Strategic Account Planning integration with CRM system.

initiated.

1st of several digital "Pulse Checks" is

**Self-coaching** | With the shift towards digital learning comes the shift to digital coaching and where appropriate, digital "selfcoaching." Now, personalized, tailored self-coaching modules can be built and delivered for just-in-time refreshers, troubleshooting and retention checks. The best practices of the top performers can be digitally packaged shared by all.



Managers first observe and then take over facilitation of

virtual/digital

Application

Clinics.

embedding sessions and 1:1s continue

virtually with

digital tools

and exercises.

Captured &

Codified new

insights.

Embedding & Coaching continue with other teams and advanced digital content.



#### **IDEAS** on Embedding & Coaching

Just as many commercial teams are assessed periodically using structured proficiency levels, consider doing the same for your managers. Set up proficiency levels based on their ability to pull-through and embed new ways of field teams engaging with customer stakeholders. It will help identify those managers who still need training and accelerate their path to more effective

### **ALIGN** | Syncing brand marketing & sales

When brand marketing falls out of sync with what commercial teams in the field need to put in front of their customers, the ability of companies to be competitively differentiated is compromised. In a world where customer engagement has gone virtual and digital, this disconnect is amplified. But it doesn't have to be that way. Getting brand teams to look at what they create through the lens of what's changing in the customer ecosystem is the first place to start.



ial build & preparation of digital tools for client/ stakeholder engagement.

Virtual coaching

content & tools

are tailored for

each manager

and team.

#### **Customer Success** Story | EU

gained approval for a new heart failure medication in a major market. Brand marketing had previously supplied the field force with product-based sales aides. The needs of the customer have shifted however and the company wanted to mirror that shift conversations with customer stakeholders. Clarity coordinated with the brand team and

commercial in the creation of an interactive

digital patient journey tool and resources.

A Top 5 global pharmaceutical company

" The same product messages are being pushed through 10-20 channels. The customer is not pleased."

- eyeforpharma



inal build & preparation of client/ stakeholder

Account teams using the tools and generating new insights & conversations

## A bit of Clarity might help.

Ready to start building your own Digital Engagement Roadmap? Talk with a Clarity team member today to get inspired with insights and examples of companies in multiple industries blazing new trails of customer interaction in a virtual world.

Visit us at: www.claritycx1.com



held virtually.

participate in

Spaced Learning

virtual sessions.

See "Prepare"

track above).

digital tools for engagement.

stakeholders.

with account

Coaching and

weekly 1:1s.

Virtual APP clinics

for Strategic

Accounts Team

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