

IQVIA Empowers Orchestrated Customer Engagement With its Next Best Artificial Intelligence Engine



Boost your organization's decision-making competency with behavior-changing intelligence embedded in daily workflows



Foreword

Life sciences companies are making the fast shift to digital engagement models in response to changing healthcare professional (HCP) preferences. Artificial intelligence (AI) is quickly becoming a necessity for orchestrating personalized, seamless customer experiences.



According to a recent survey conducted by Industry Dive, four out of five biopharma executives will use AI and machine learning (ML) to guide engagement decisions over the next 12–18 months.

However, the effectiveness of AI in improving HCP engagement strategies is limited when there is no clear way to utilize insights. Historically, the productivity of commercial teams was hindered by insights inconveniently buried across inboxes, dashboards, and siloed business processes.

The real value of AI is reaped when complex data is transformed into clear, easy-to-understand recommendations that are surfaced at the point of execution.

The recent launch of OCE+ demonstrates this value. The IQVIA Orchestrated Customer Engagement platform is now powered by IQVIA Next Best to embed behavior-changing intelligence and AI decision-support into daily workflows, one recommendation at a time.

OCE+ has a rich variety of AI/ML algorithms that generate contextual, actionable, and trackable recommendations to improve decision-making when it matters most. This eBook delves into the inner workings of five key algorithms and how IQVIA is leading the way in the new frontier of intelligent customer engagement.



Business people still struggle to know which insights to act on, because even with modern analytics and business platforms, insights are not contextualized, easily consumable, or actionable by the majority of users. They are drowning in data and, especially as the complexity of data increases, they are struggling to identify what is most important and what are the best actions to take.

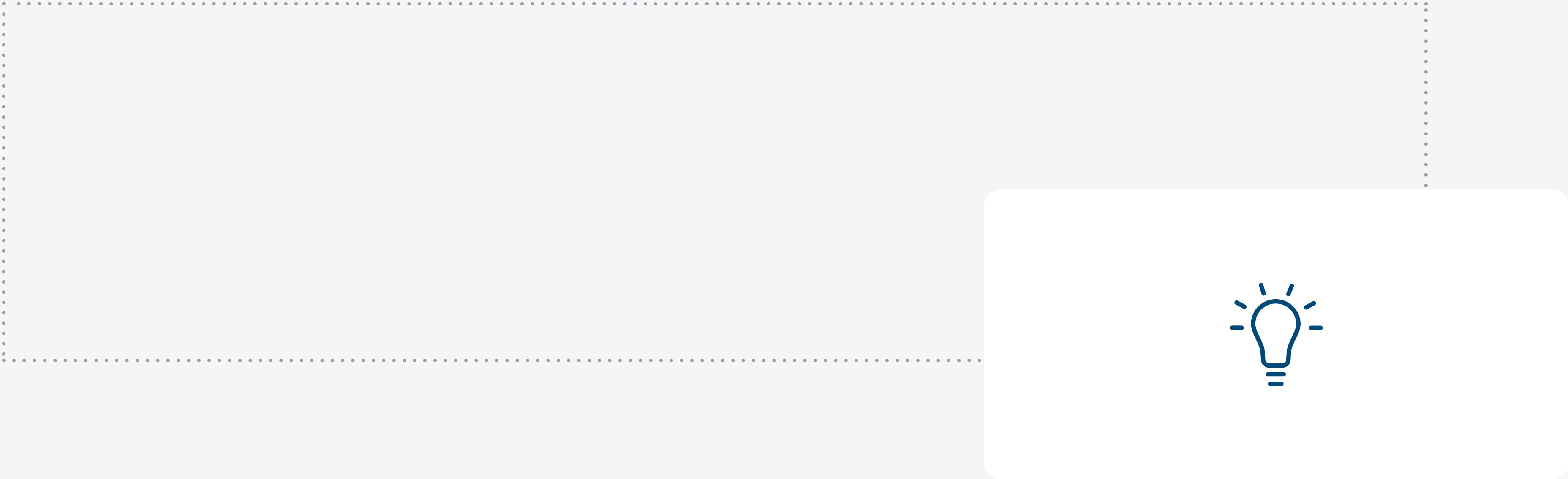
Top 10 Trends in Data and Analytics, 2020. Gartner, 11 May 2020.

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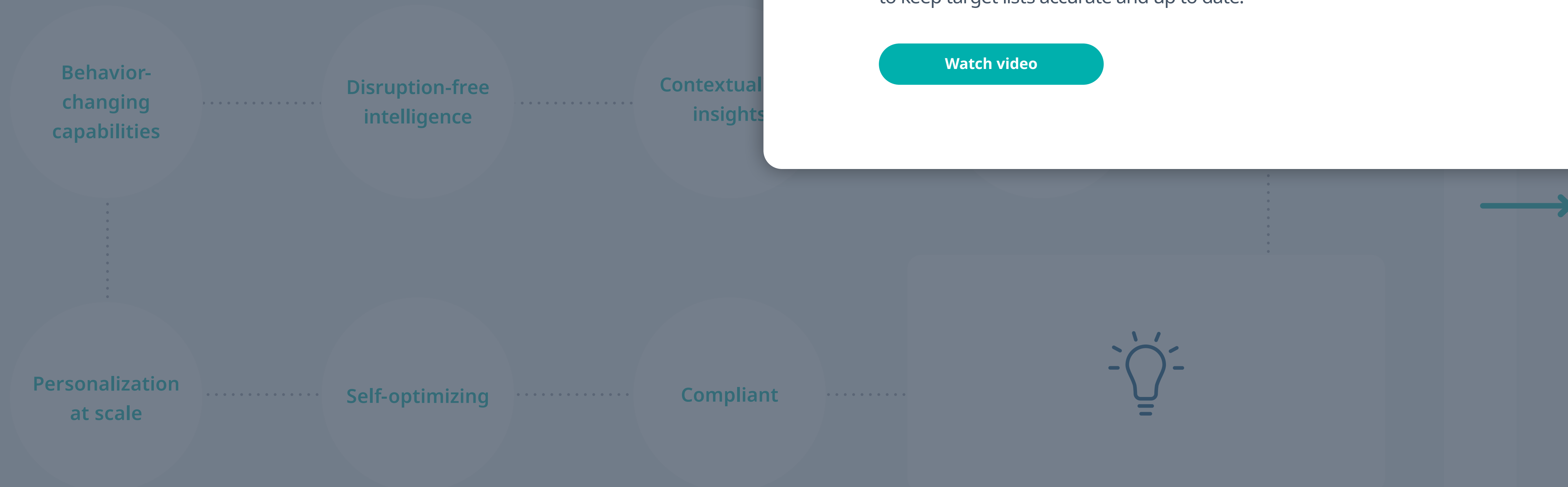


How IQVIA OCE and IQVIA Next Best work synergistically



Discover OCE+

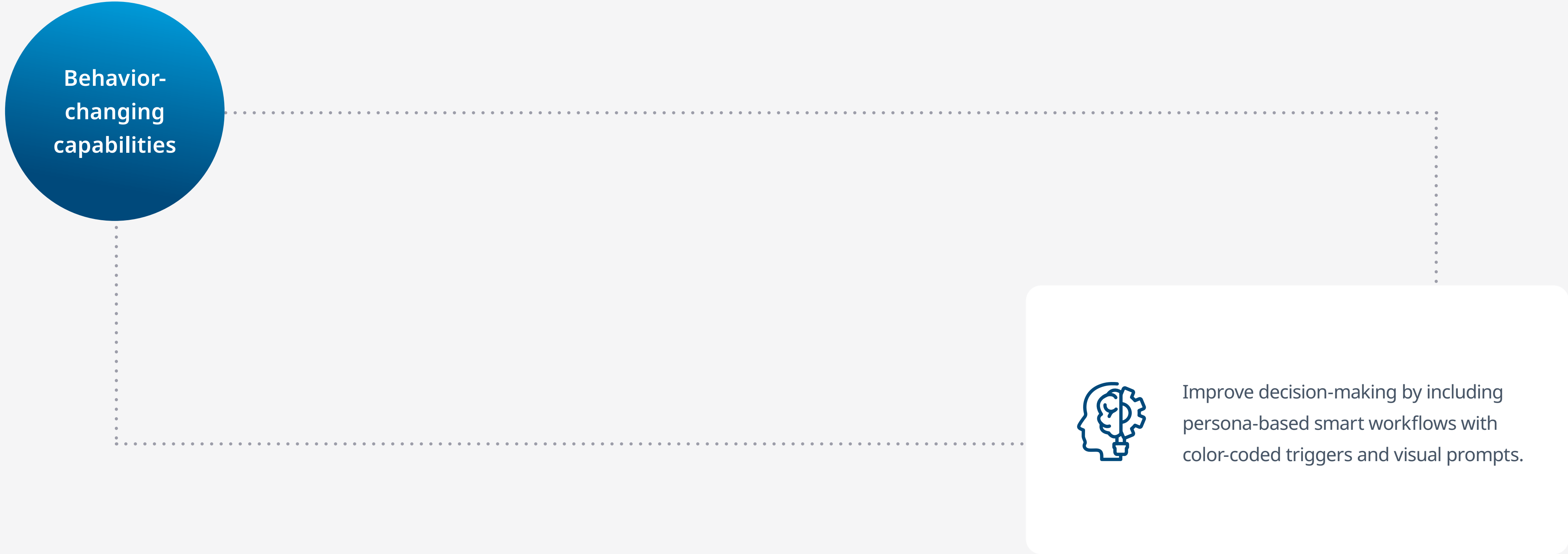
How IQVIA OCE and IQVIA Next Best work synergistically



The effectiveness of an engagement depends heavily on the company's ability to swiftly adapt outreach activities in response to ever-changing HCP characteristics. An IQVIA analysis of historic prescribing data shows that 40% of HCPs can change segments as often as every six months, whereas HCP target lists are often only updated every 12-36 months. This misalignment can be costly for pharma companies, so it is essential to keep target lists accurate and up to date.

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How IQVIA OCE and IQVIA Next Best work synergistically





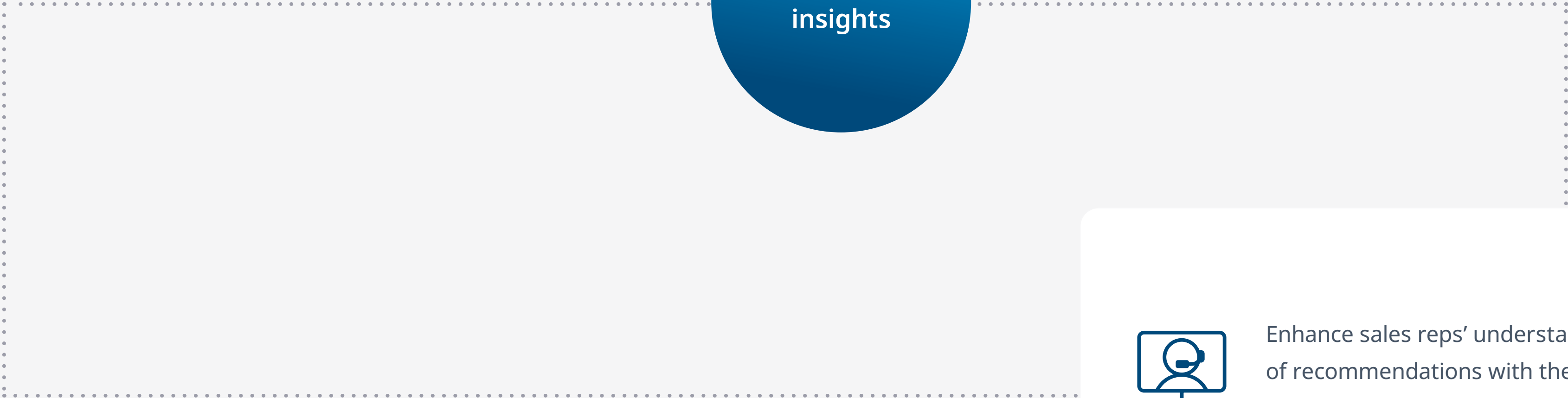
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Increase adoption of insights with intelligence that's seamlessly embedded within workflows.



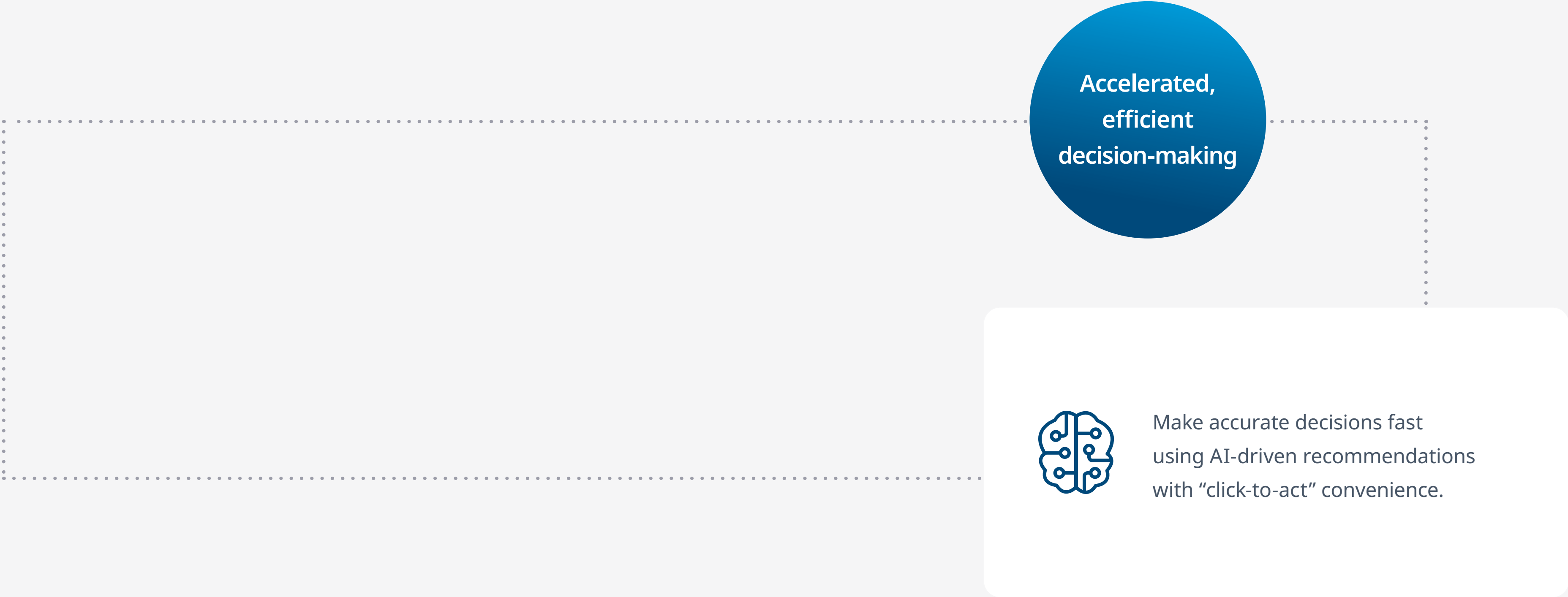
How IQVIA OCE and IQVIA Next Best work synergistically



Enhance sales reps' understanding of recommendations with the ability to drill into supporting details.

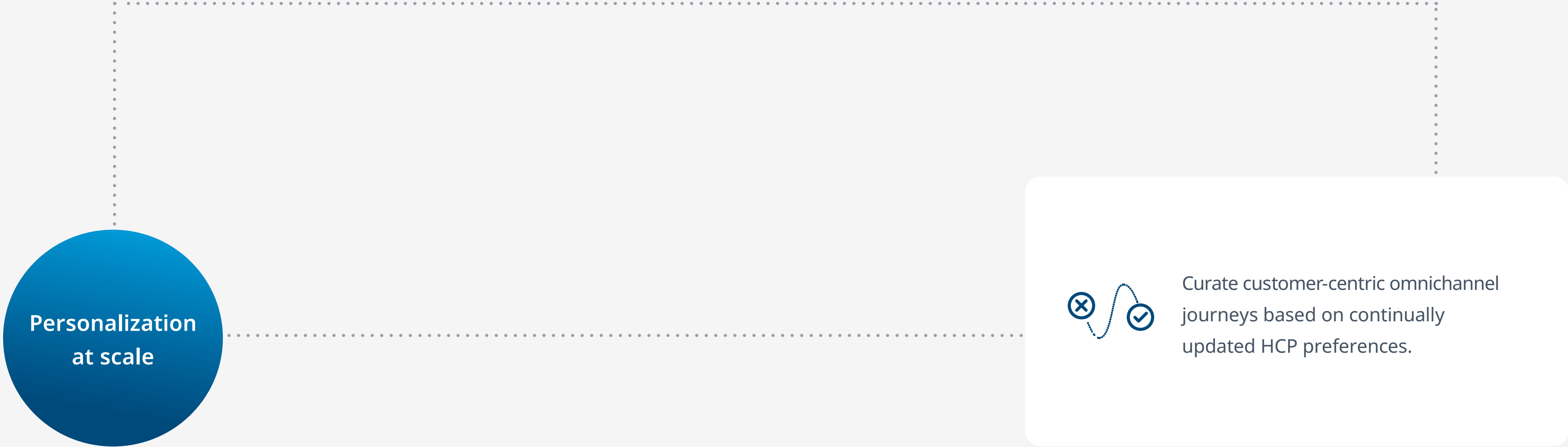


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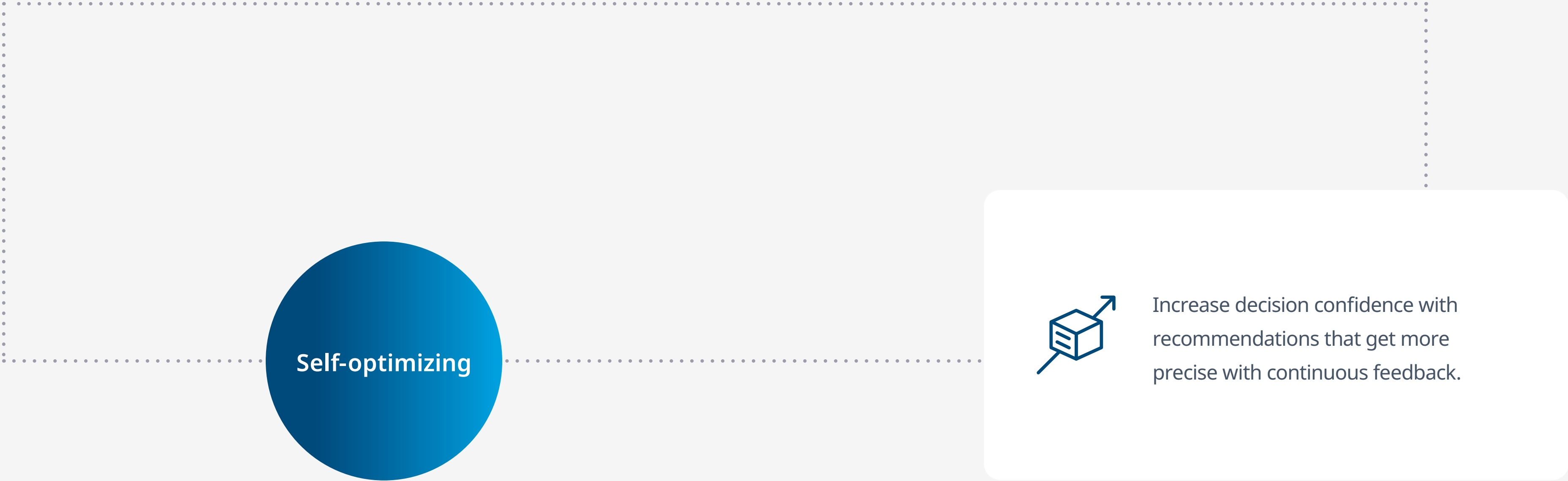




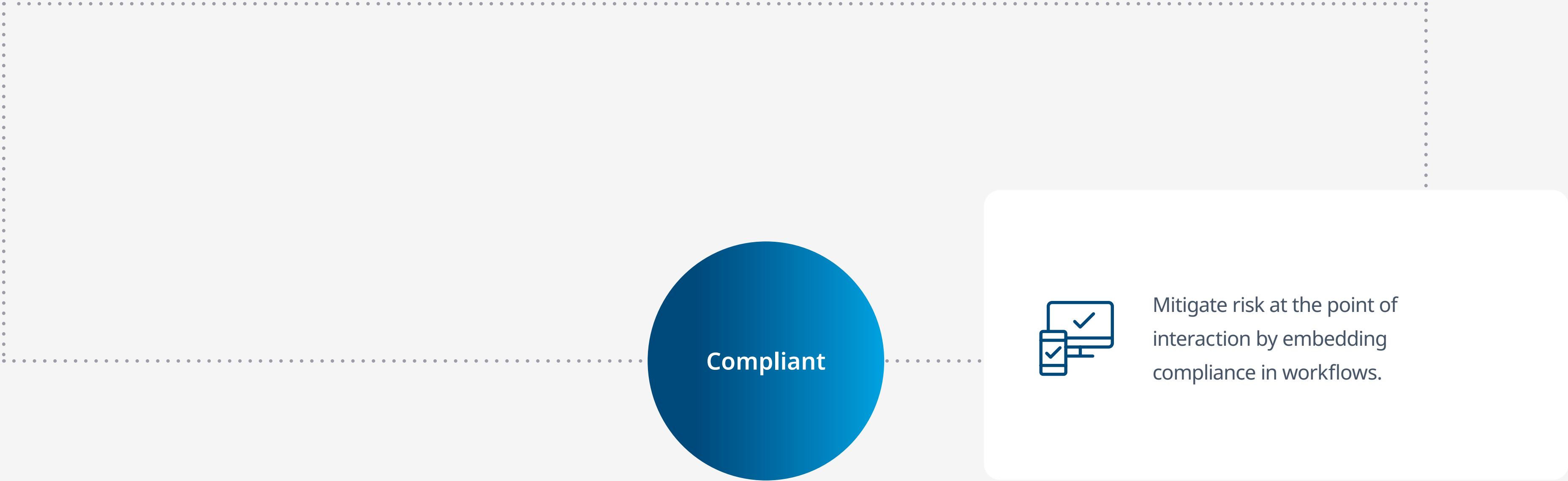
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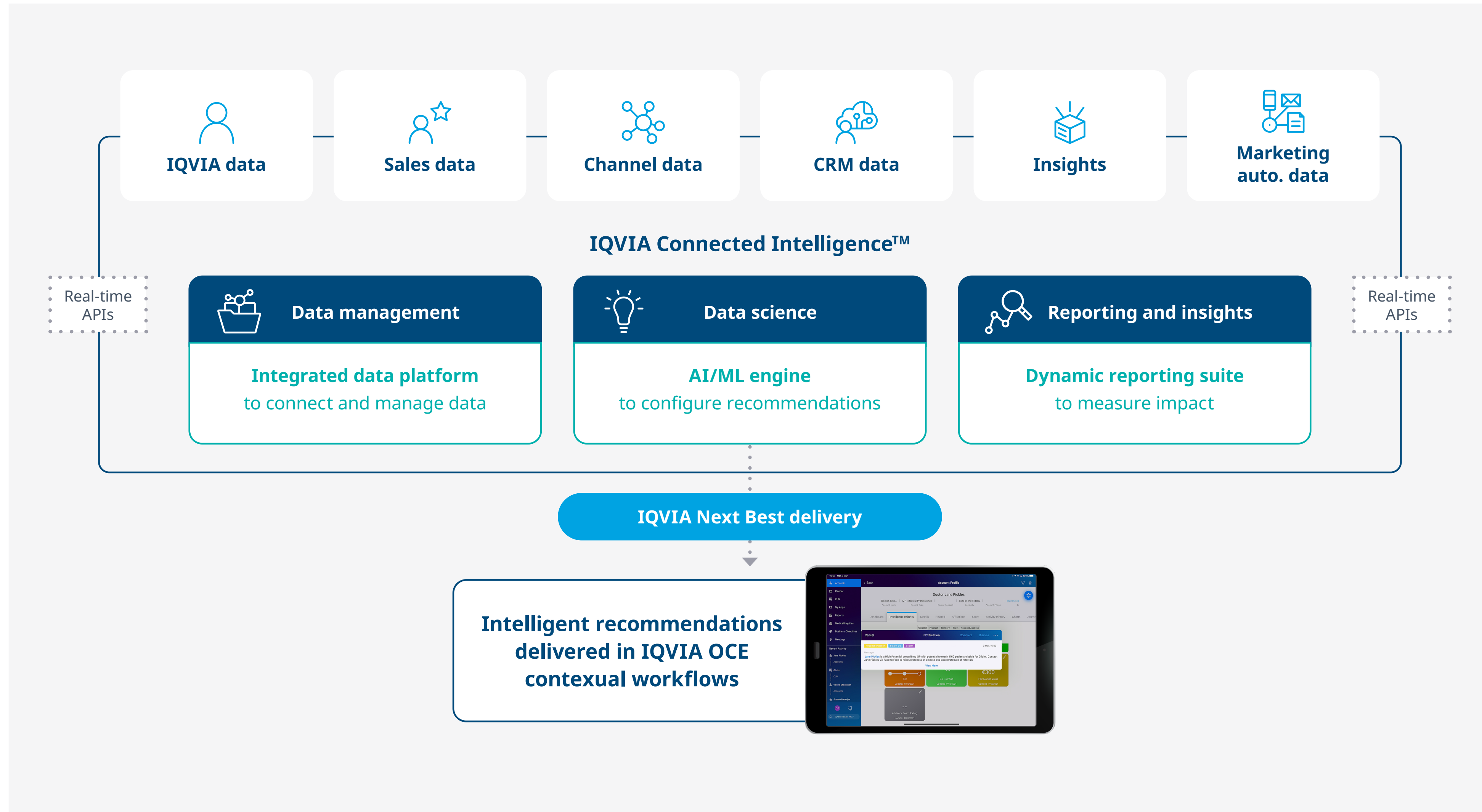
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Discover OCE+

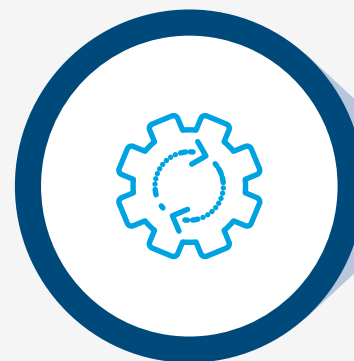


The synergies of engagement and intelligence technologies

This seamless integration and interoperability of IQVIA data, OCE, and Next Best bring the following advantages for organizations.



No data silos, information gaps, or record discrepancies that could reduce users' confidence in the recommendations.



A connected system creates a "closed-loop" learning process that continuously feeds performance data back into the organization, so commercial teams can correct and adapt in real time to optimize targeting and segmentation. It is also possible to create key performance indicators around the impact of recommendation adoption on sales.



Tangible time and cost savings over a mixture of point solutions. There is no need to build out integrations or harmonize the data across applications; the IQVIA solution uses pre-built connectors and is ready to go on day one.

Discover the AI/ML algorithms behind OCE+

 Click teal components to reveal 

OCE+ surfaces recommendations from over 35 algorithms to provide personalization at scale, creating customer-centric journeys based on continually updated HCP preferences to deliver the right content, at the right time, with the right message through preferred channels.

These algorithms are 'glass box', giving your data scientists full transparency and flexibility to adapt them according to your company's own unique needs, enabling self-service capabilities. They are self-optimizing, meaning they are continuously learning through a feedback loop of performance data and interaction history to optimize engagements in real-time. Furthermore, these pre-defined algorithms make it easy to scale across therapeutic areas and markets, helping to accelerate time-to-insights.

Key benefits of IQVIA's AI/ML algorithms

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Key benefits of IQVIA's AI/ML algorithms

Templates make it easy to scale and accelerate deployment across brands and therapeutic areas.

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Key benefits of IQVIA's AI/ML algorithms

Tailored for personal
and digital channels,
and diverse personas.

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Key benefits of IQVIA's AI/ML algorithms

Bridges the gap between business users and data scientists by being easy to adapt and extend algorithms in-house, without external support.

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Key benefits of IQVIA's AI/ML algorithms

Data scientists can view, explore, and tune them to incorporate new data and support existing ML investments.

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Key benefits of IQVIA's AI/ML algorithms

Trained on IQVIA's data universe and can be supplemented with client-specific training.

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Key benefits of IQVIA's AI/ML algorithms

Local nuances can be incorporated for successful global deployments.

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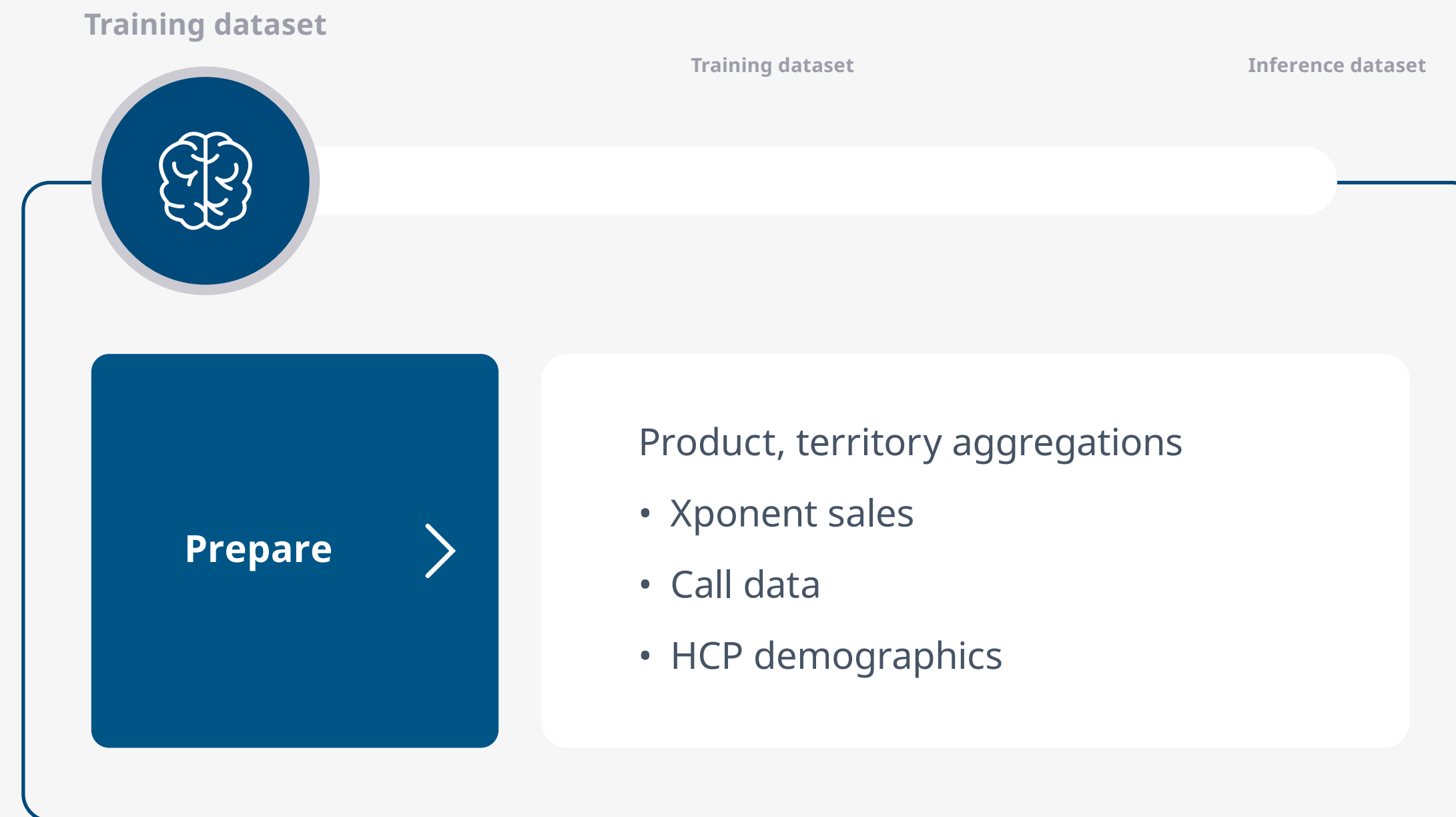
IQVIA Next Best Customer

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The first critical step for commercial teams is identifying and locating high-value HCPs. With this algorithm, you can optimize outreach efforts to target high-value HCPs according to product and territory, enabling you to boost sales performance and revenue.

With IQVIA Next Best Customer, sales reps can identify top performing accounts while considering multiple dimensions, including customers' availability and distance. It also provides rationale into why visiting a particular HCP is beneficial. Ultimately, it improves sales rep productivity and decision-making efficiency.

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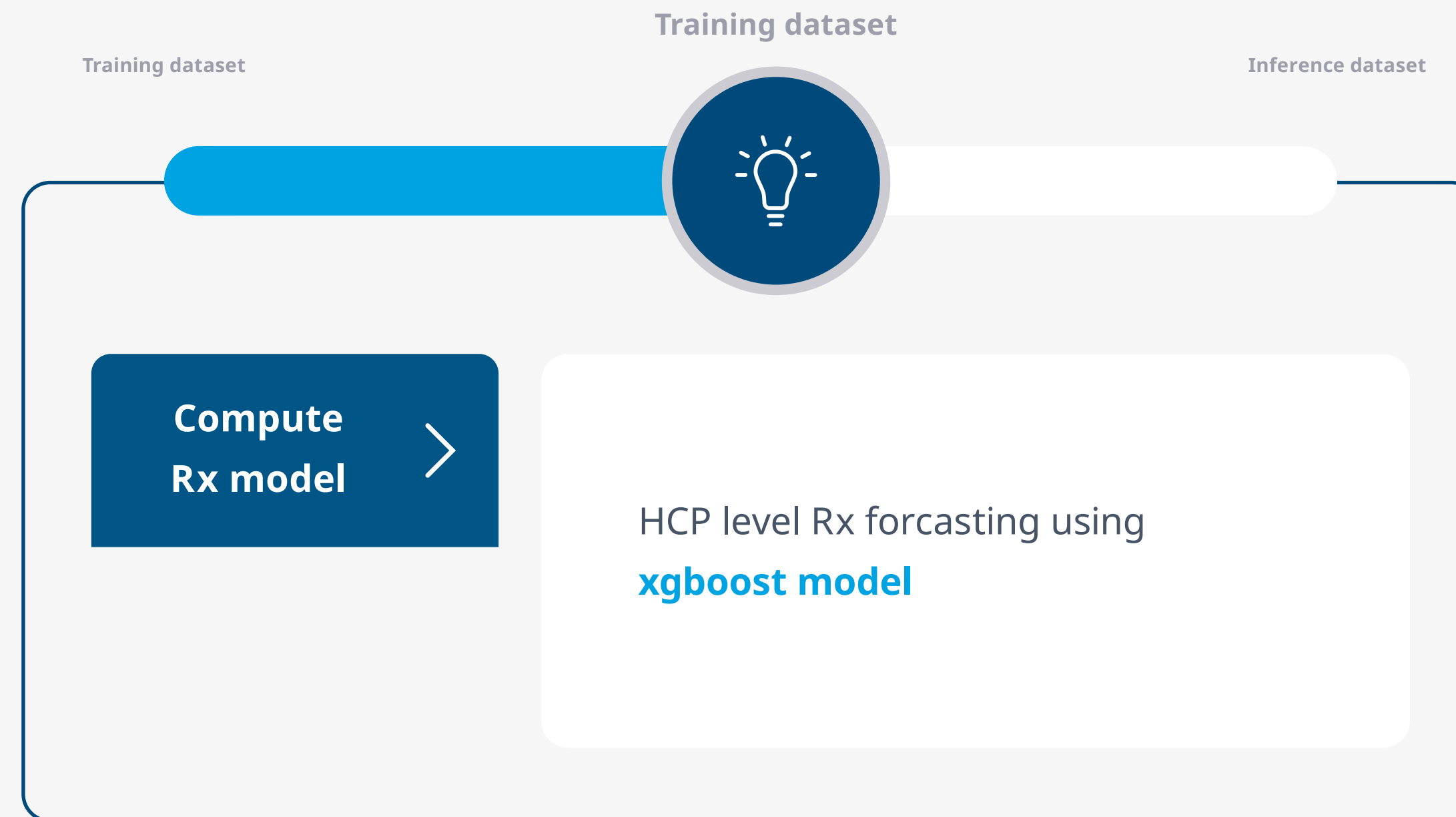
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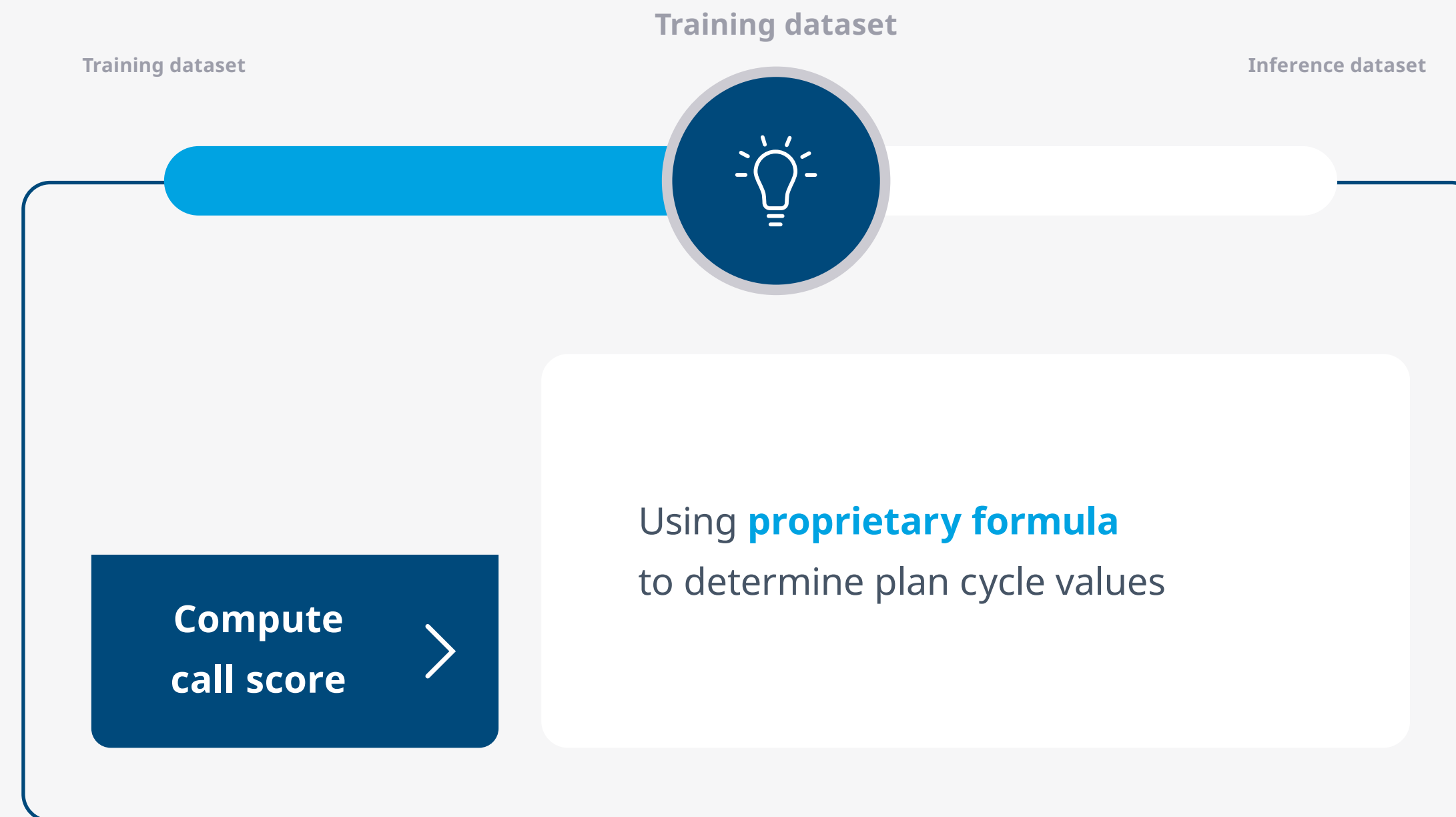
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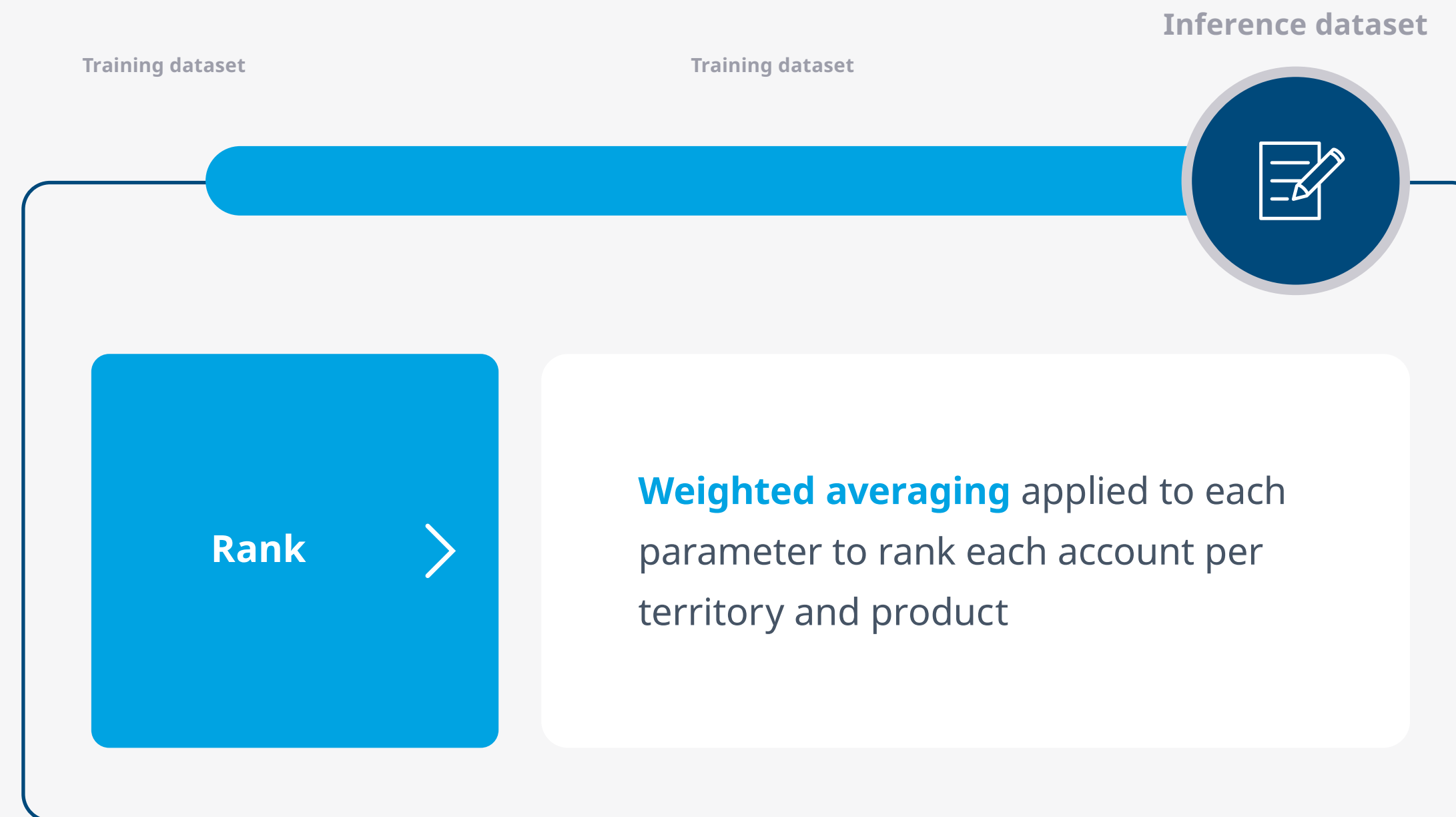
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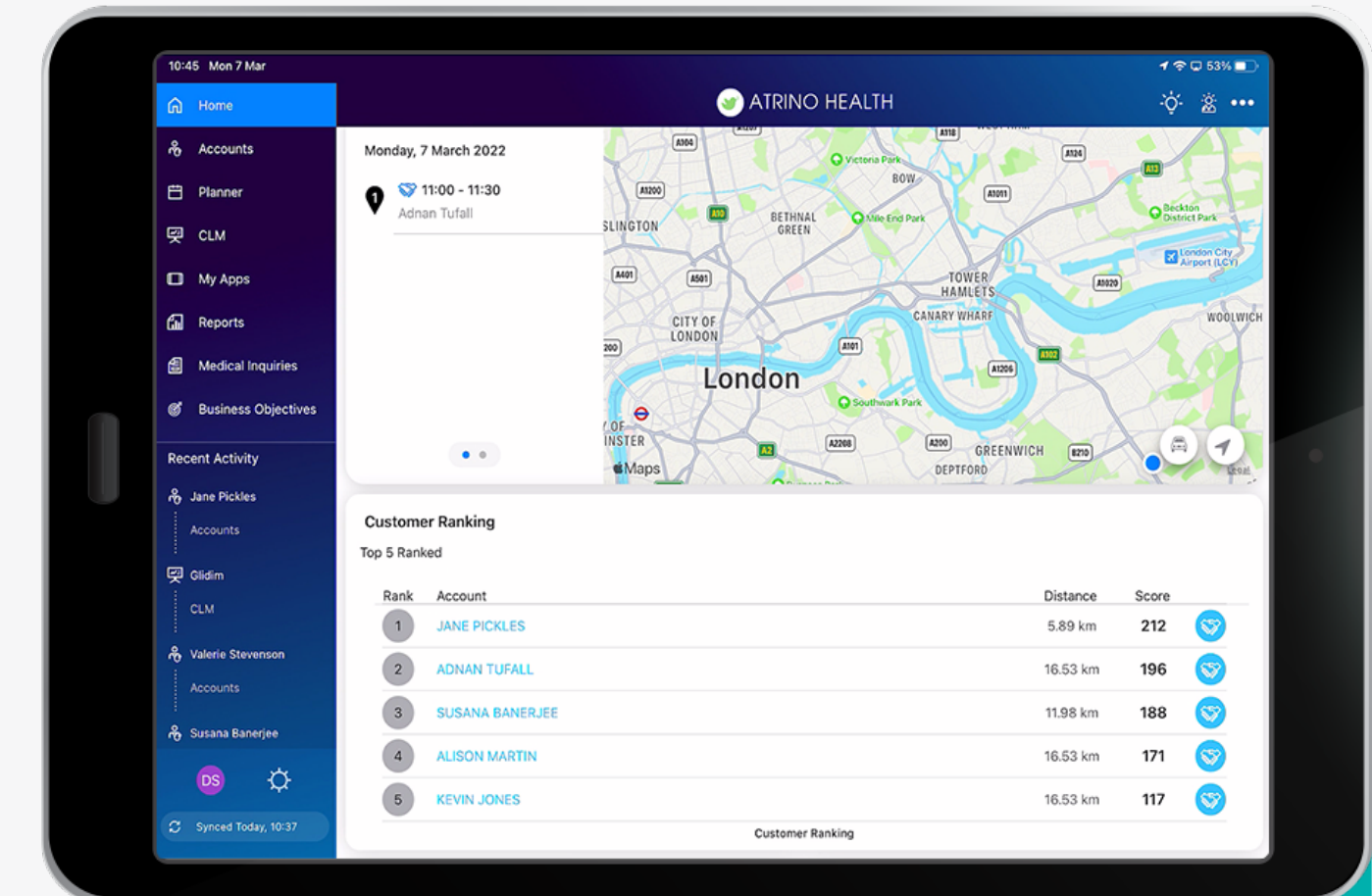
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IQVIA Next Best Customer

How it works

- 1 HCPs are valued in terms of sales volume, prescribing value, and responsiveness, using IQVIA's Xponent sales data, call data, and HCP demographics data.
- 2 Using a proprietary formula, the algorithm computes call scores to determine plan cycle values.
- 3 Weighted averaging is applied to each parameter to rank HCPs per territory and product.
- 4 There are four interweaved processes that work to complement this algorithm:
 - **Call pacing** — Helps sales reps adjust call plans and refocus outreach on high value HCPs.
 - **Rx/Sales prediction** — Helps sales reps plan outreach based on early signs of growing or declining prescriber value.
 - **Rx/Sales anomaly** — Notifies sales reps when there are sharp fluctuations in sales volume and highlights high value prescribers in that area.
 - **HCP call reactivity** — Helps sales reps prioritize efforts on prescribers that are most responsive to their campaigns and have a greater sales impact.



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IQVIA Next Best Customer

How it works

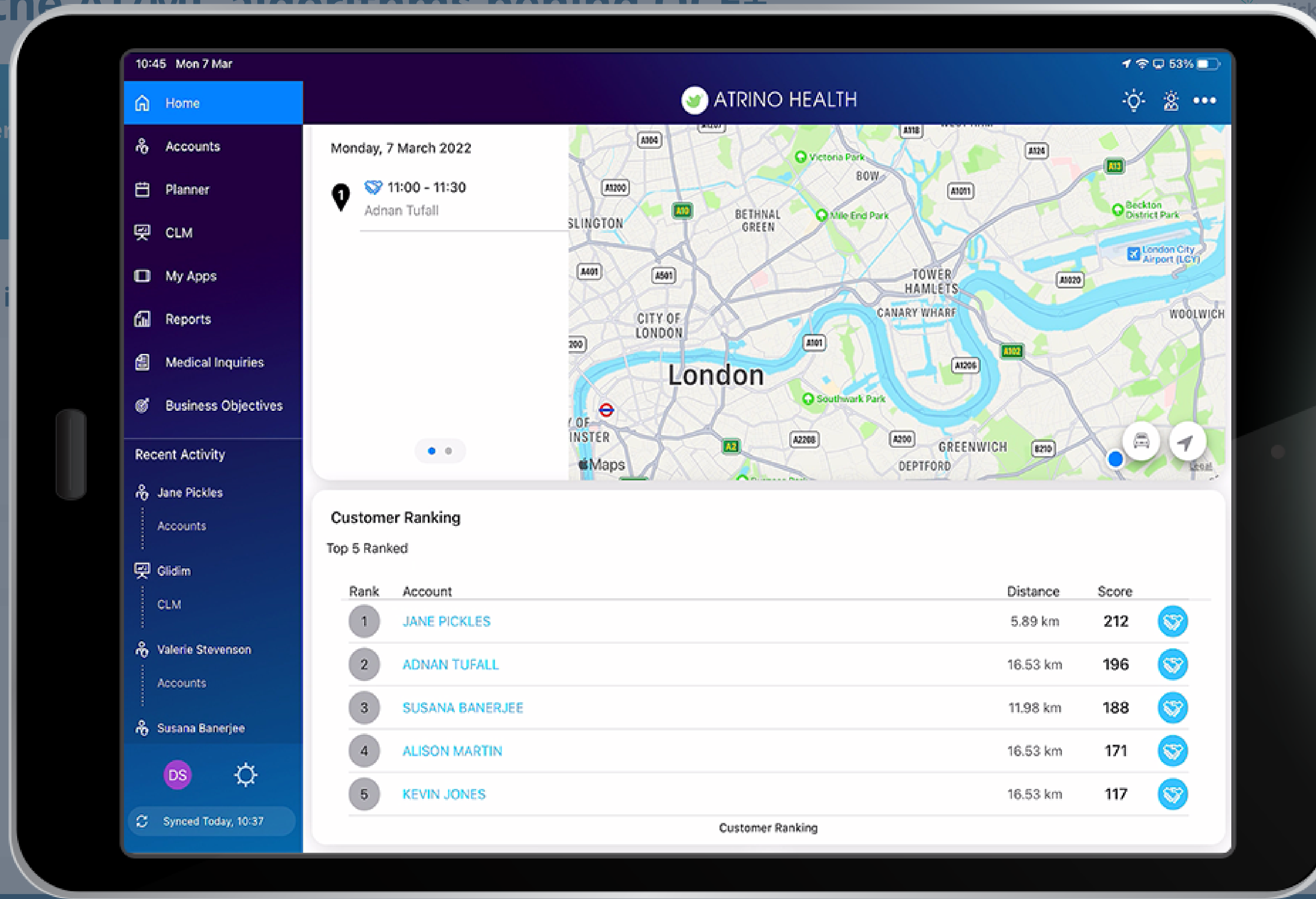
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IQVIA Patient Triggers

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Discover the AI/ML algorithms behind OCE+

Click teal components to reveal

IQVIA Next Best Message

IQVIA Next Best Message

Once sales reps have identified their high value HCPs through IQVIA Next Best Customer, they need to understand what to say when reaching out to them. The IQVIA Next Best Message algorithm aggregates HCP demographics data, message metadata (a record of different brand/product message options), and reaction data (identifies the message that resonates with specific HCPs the most) to specifically tailor the conversation to each HCP in a given territory, product, or account.

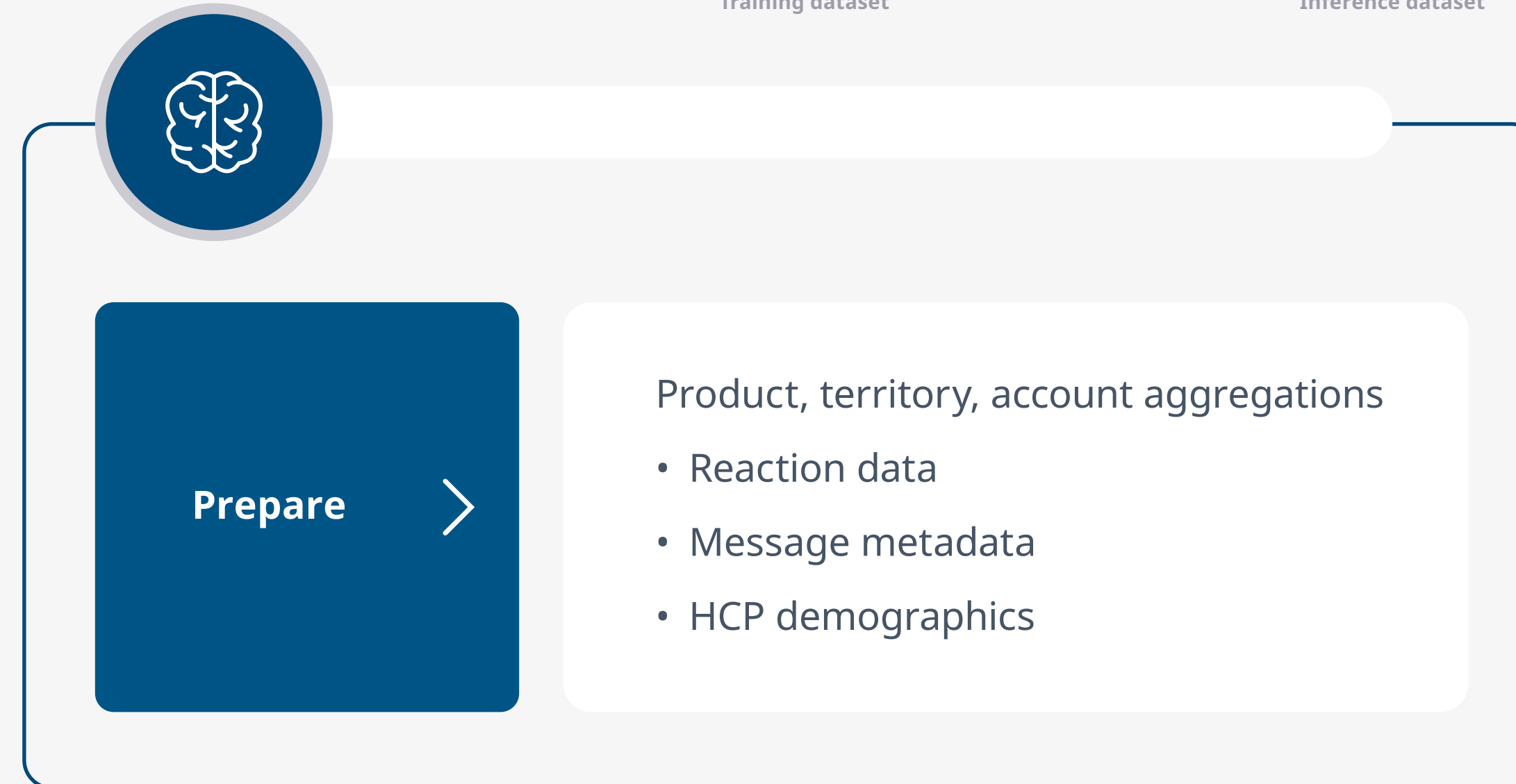
IQVIA Next Best Message improves call quality and overall engagement with HCPs by enabling sales reps to deliver the most effective and relevant message. Tailoring messaging and topics of content to specific HCPs, territories, and products allows sales reps to personalize outreach.

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Training dataset

Training dataset

Inference dataset



Discover the AI/ML algorithms behind OCE+

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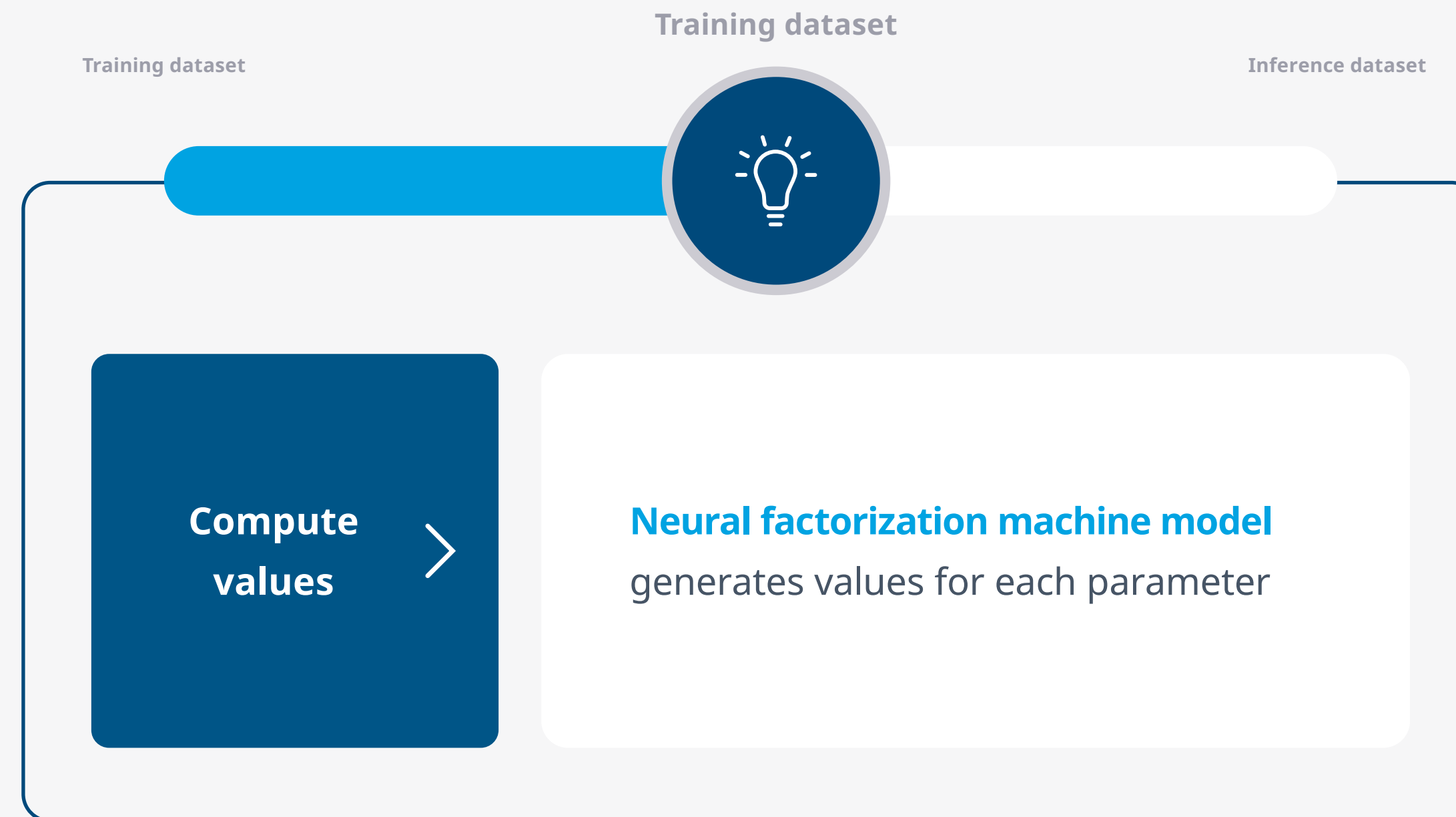
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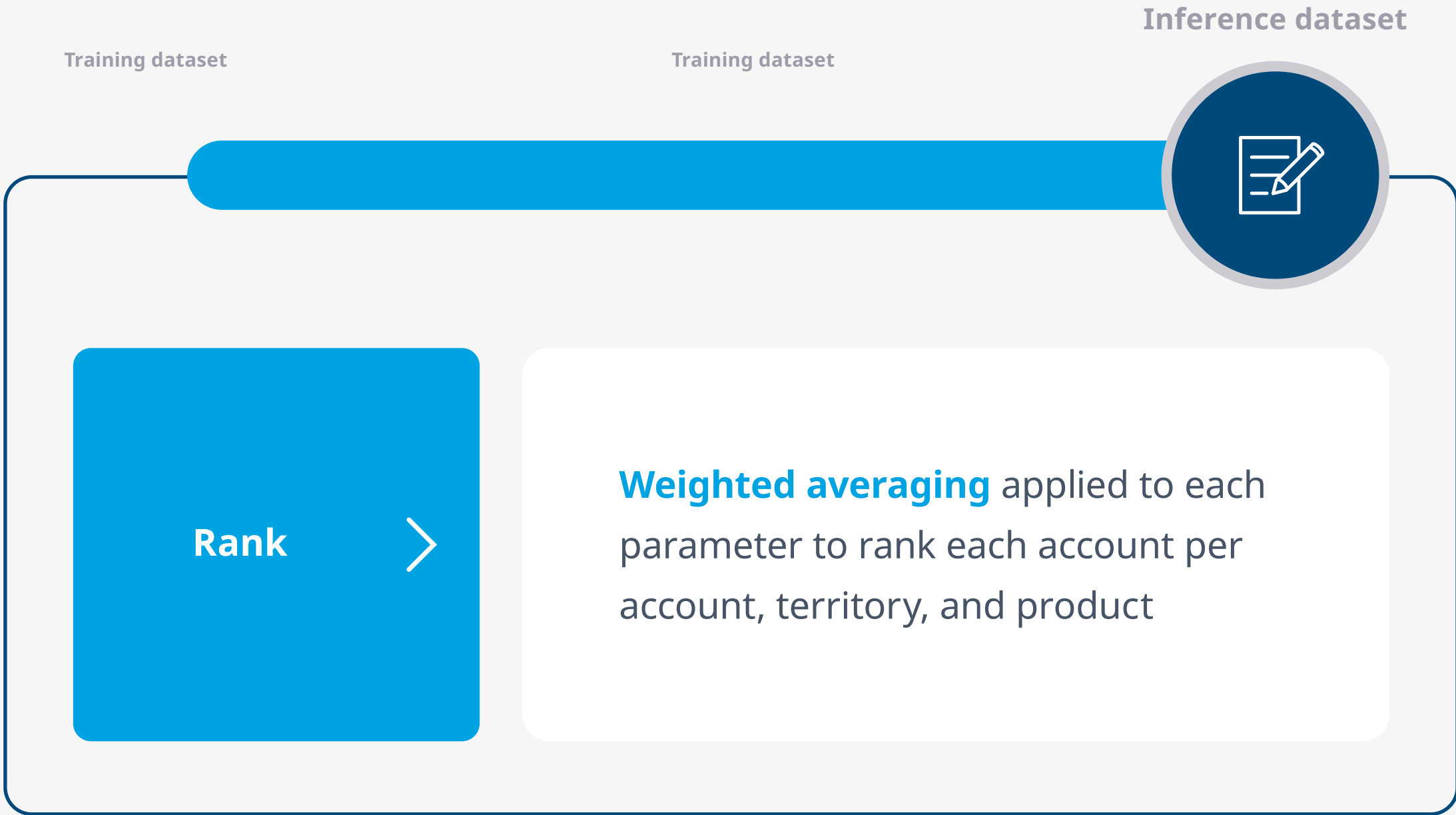
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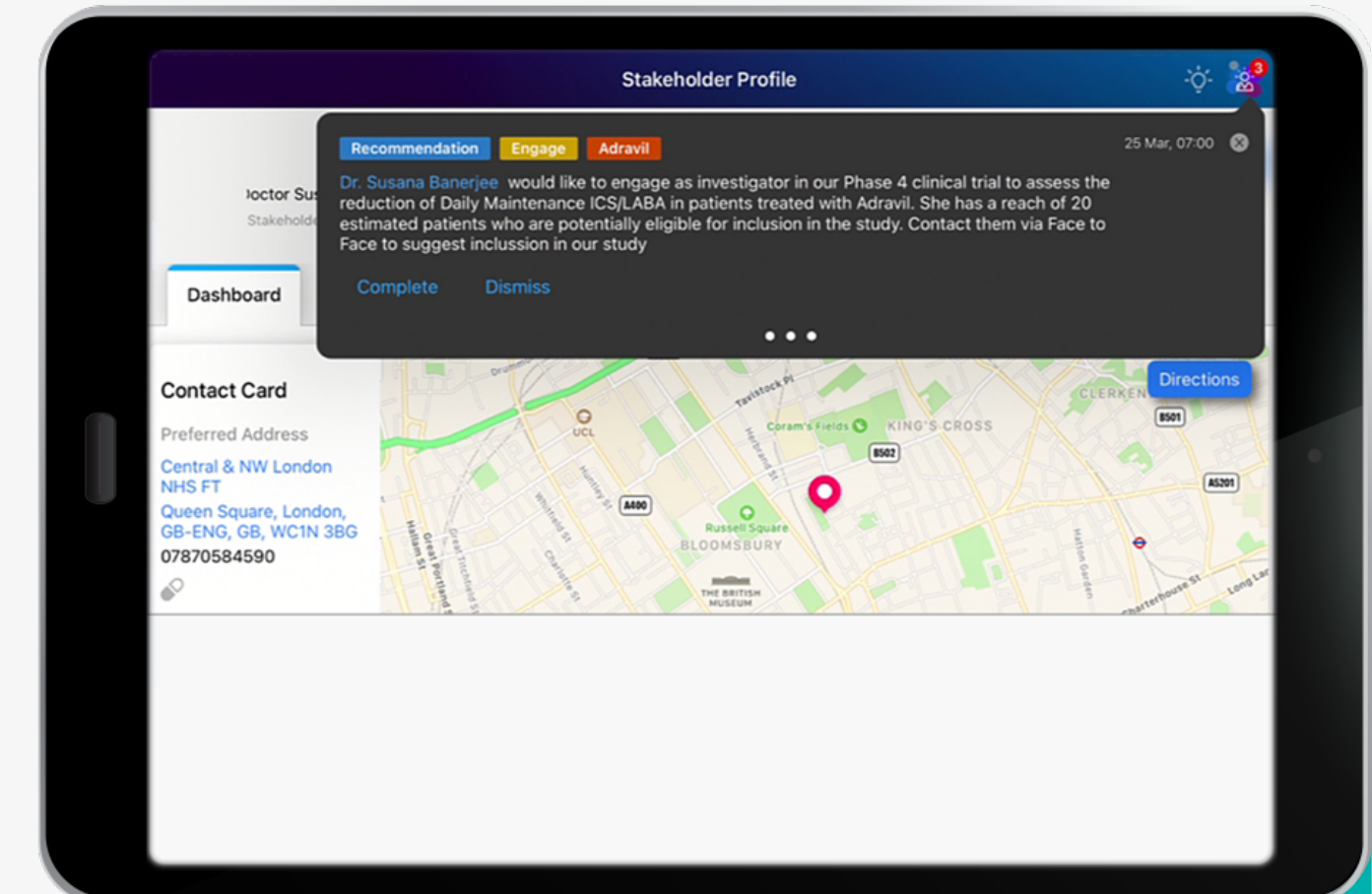
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IQVIA Next Best Message

How it works

- 1 Data is collected from three different parameters: HCP demographics, message metadata, and reaction data.
- 2 Neural factorization machine model generates a value for each parameter: reaction data, message metadata, and HCP demographics.
- 3 Weighted averaging is applied to each parameter to rank each message per account, territory, and product.
- 4 The highest ranked message is recommended to the sales rep to use in their communications with specific HCPs.

Neural factorization machine model: Assists with sparse parameter sets by leveraging a vector space for each parameter, helping to pair interactions between parameters, in addition to learning linear weights on each parameter.



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Discover the AI/ML algorithms behind OCE+

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IQVIA Next Best Customer

IQVIA Patient Triggers

How it works

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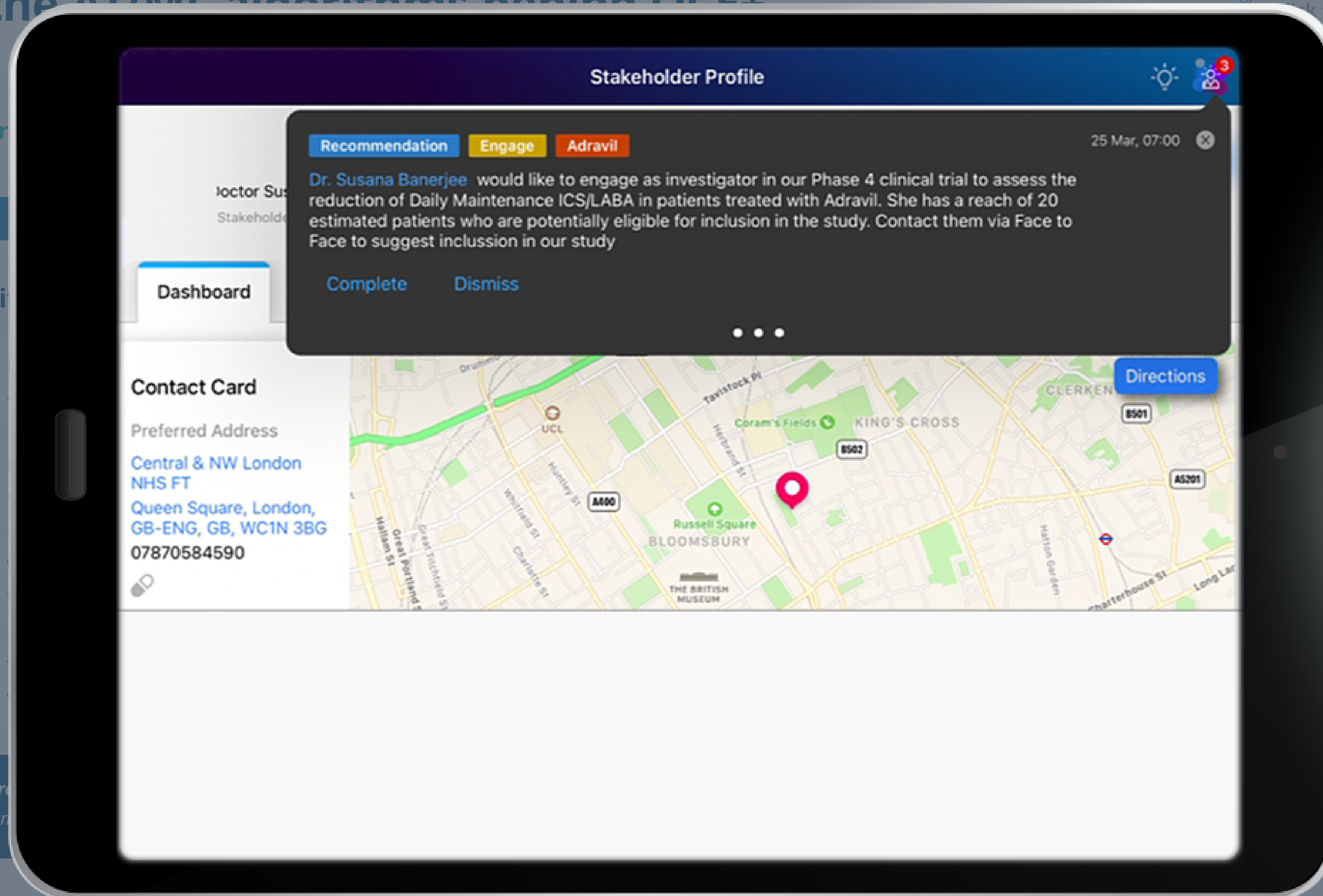
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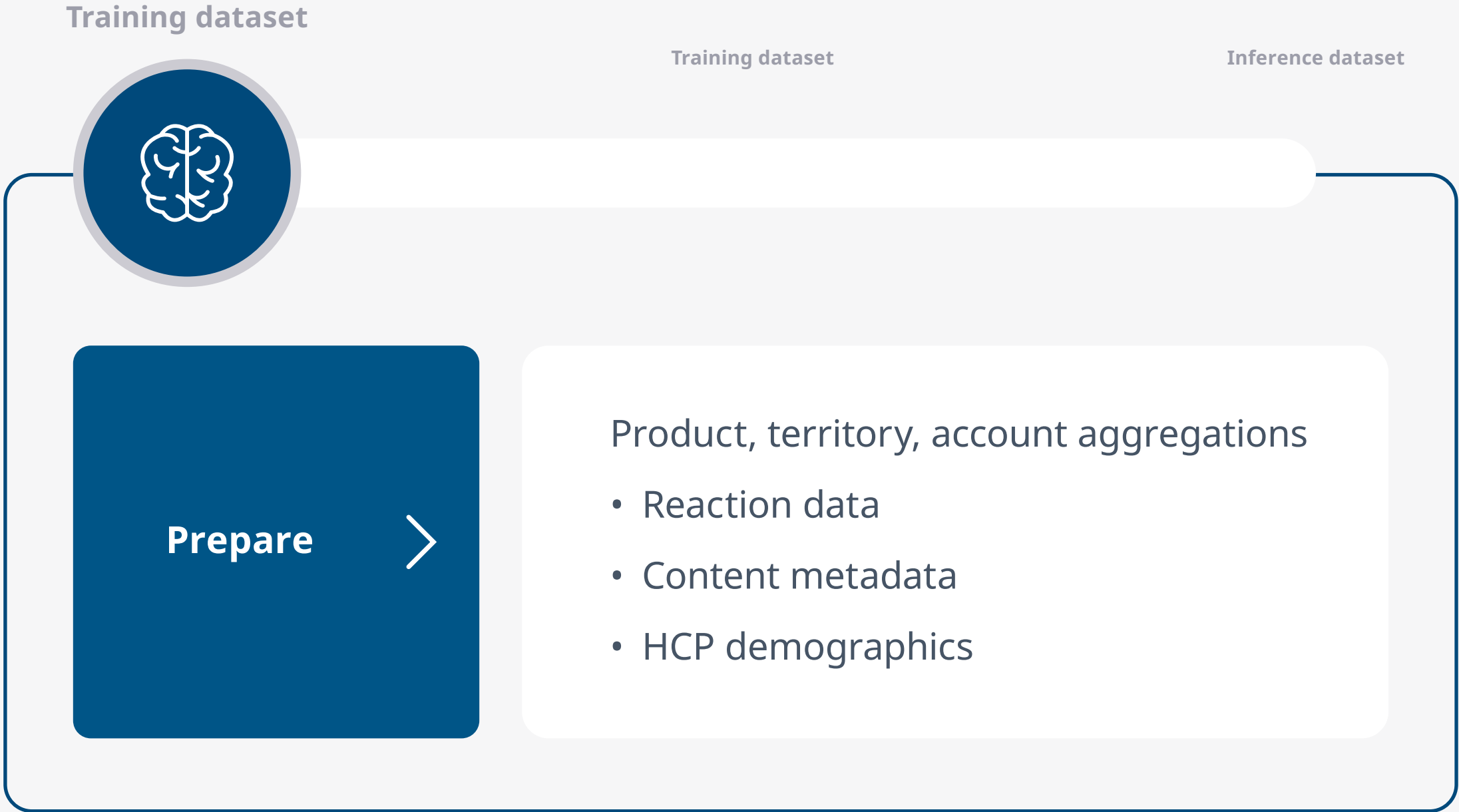
IQVIA Next Best Content

IQVIA Next Best Content

This algorithm shares recommendations on the most appropriate and engaging content that is likely to resonate with HCPs. Using a similar approach as Next Best Message, Next Best Content utilizes reaction data, HCP demographics and content metadata (records of all the different content options for a given brand or product) to suggest content to which HCPs will respond most positively.

By specifically selecting the content that resonates with HCPs, sales reps can personalize HCP engagement with precision and curate customer-centric omnichannel journeys based on continually updated HCP preferences, to build stronger, longer-lasting relationships and improve the customer experience significantly.

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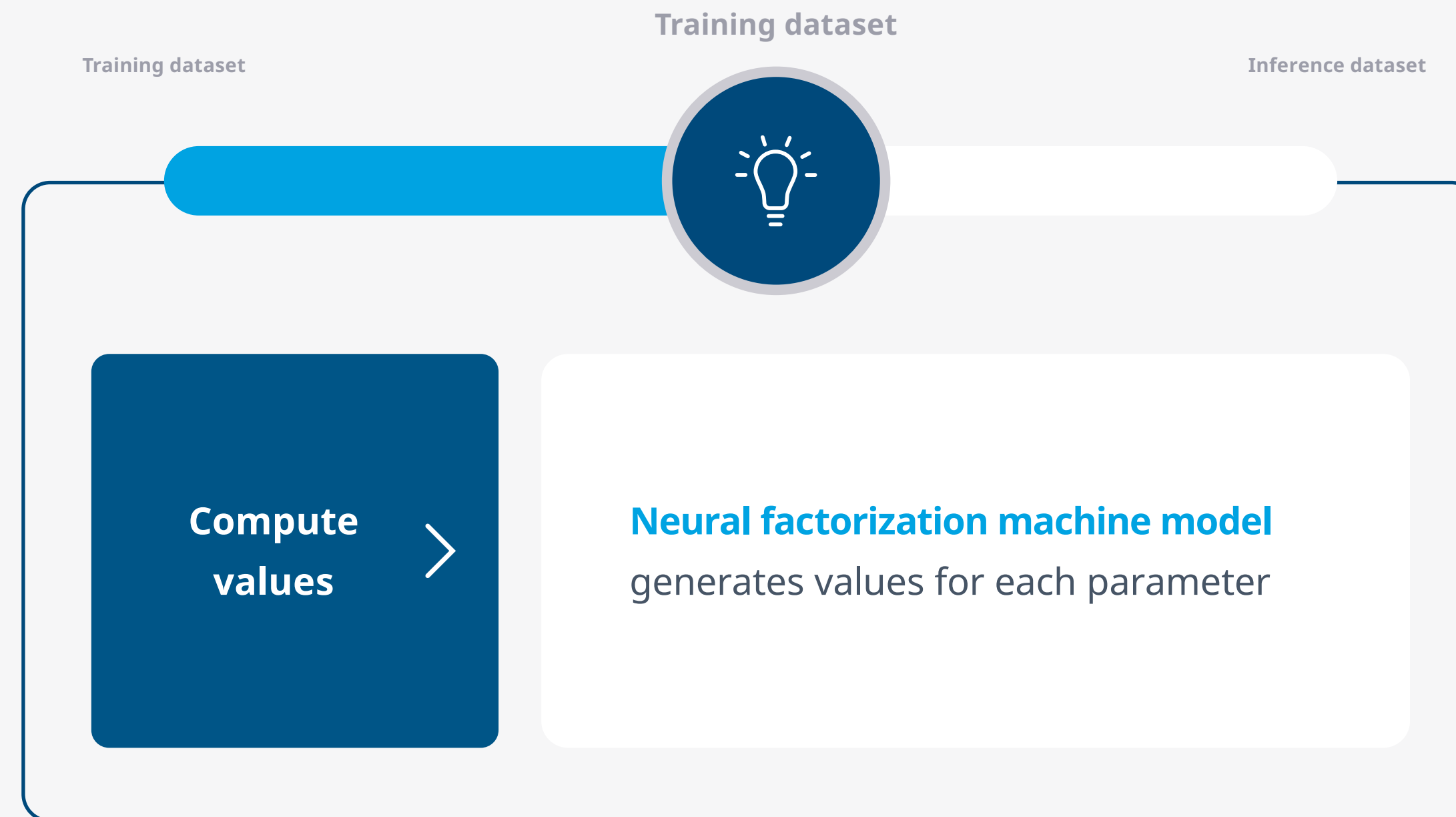
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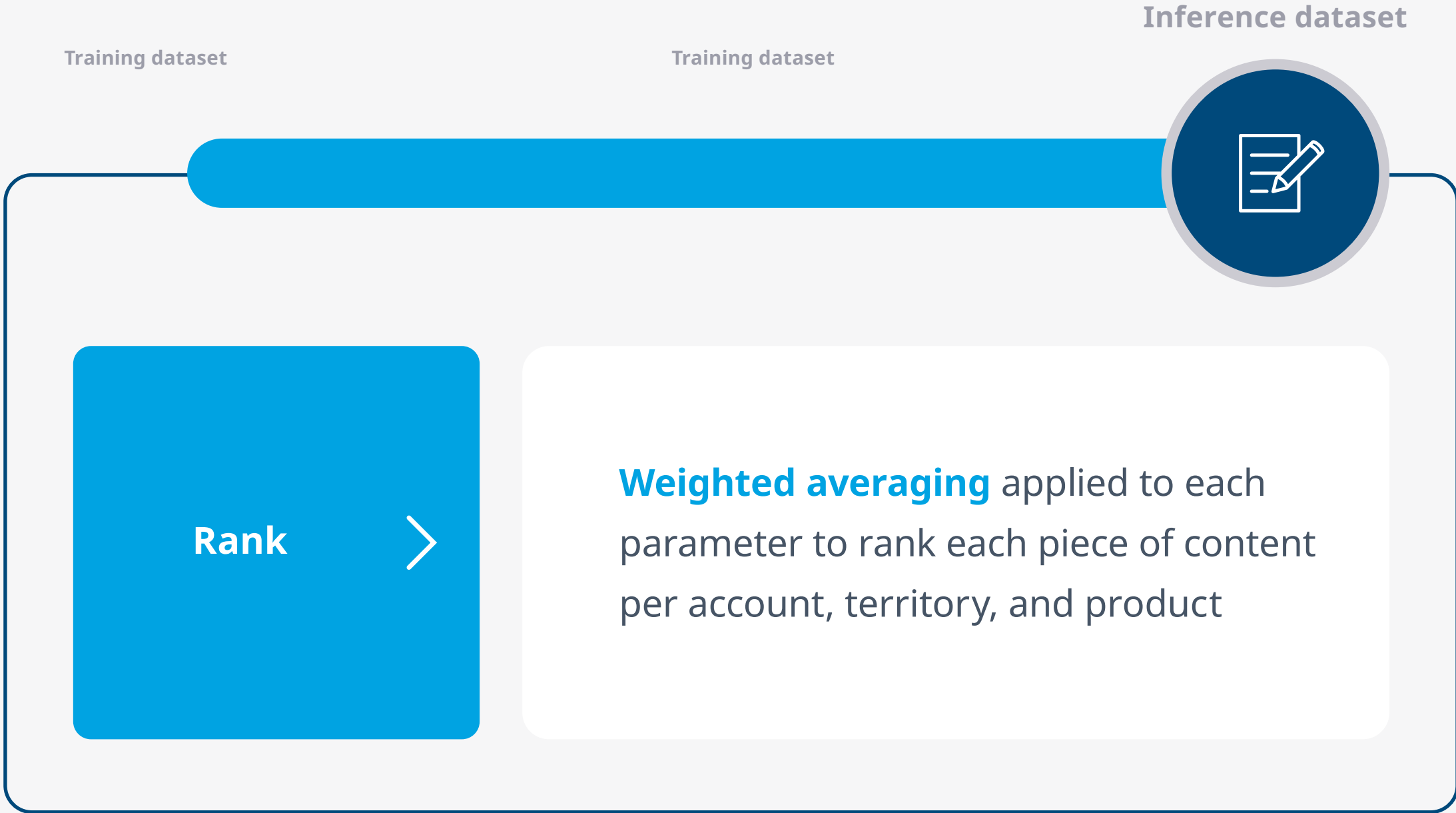
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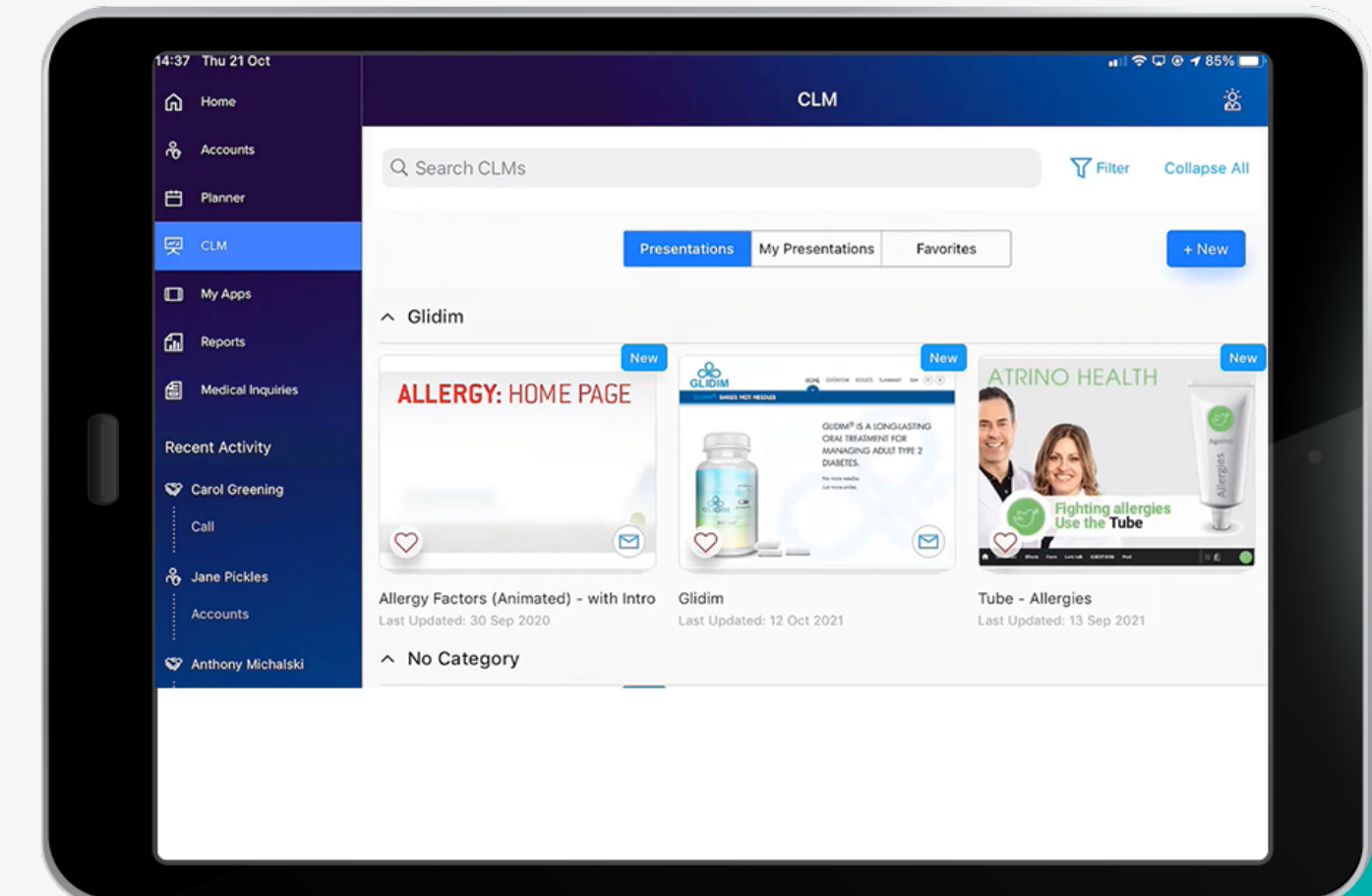
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IQVIA Next Best Content

How it works

- 1 Next Best Content aggregates reaction data, content metadata, and HCP demographics.
- 2 Neural factorization machine model generates a value for each parameter: reaction data, content metadata, HCP demographics. Weighted averaging is then applied to each parameter to rank each content type per account, territory, and product.
- 3 The highest ranked content is then recommended to the sales rep to use in their communications with specific HCPs.
- 4 Once customers begin to respond to content, the algorithm adapts and learns responses from HCPs, and then begins to recommend similar content based on historic reaction data.



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IQVIA Next Best Customer

IQVIA Patient Triggers

How it works

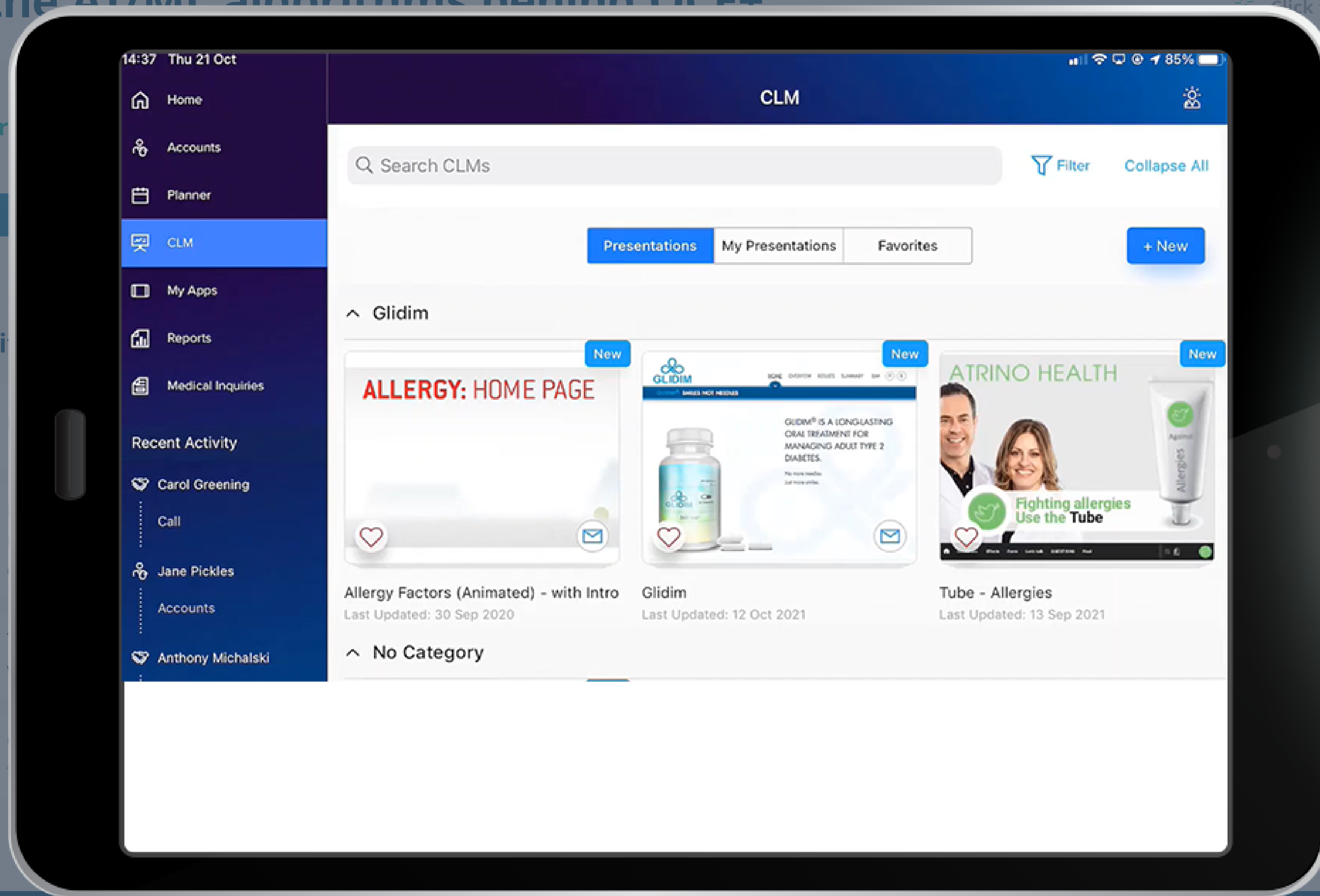
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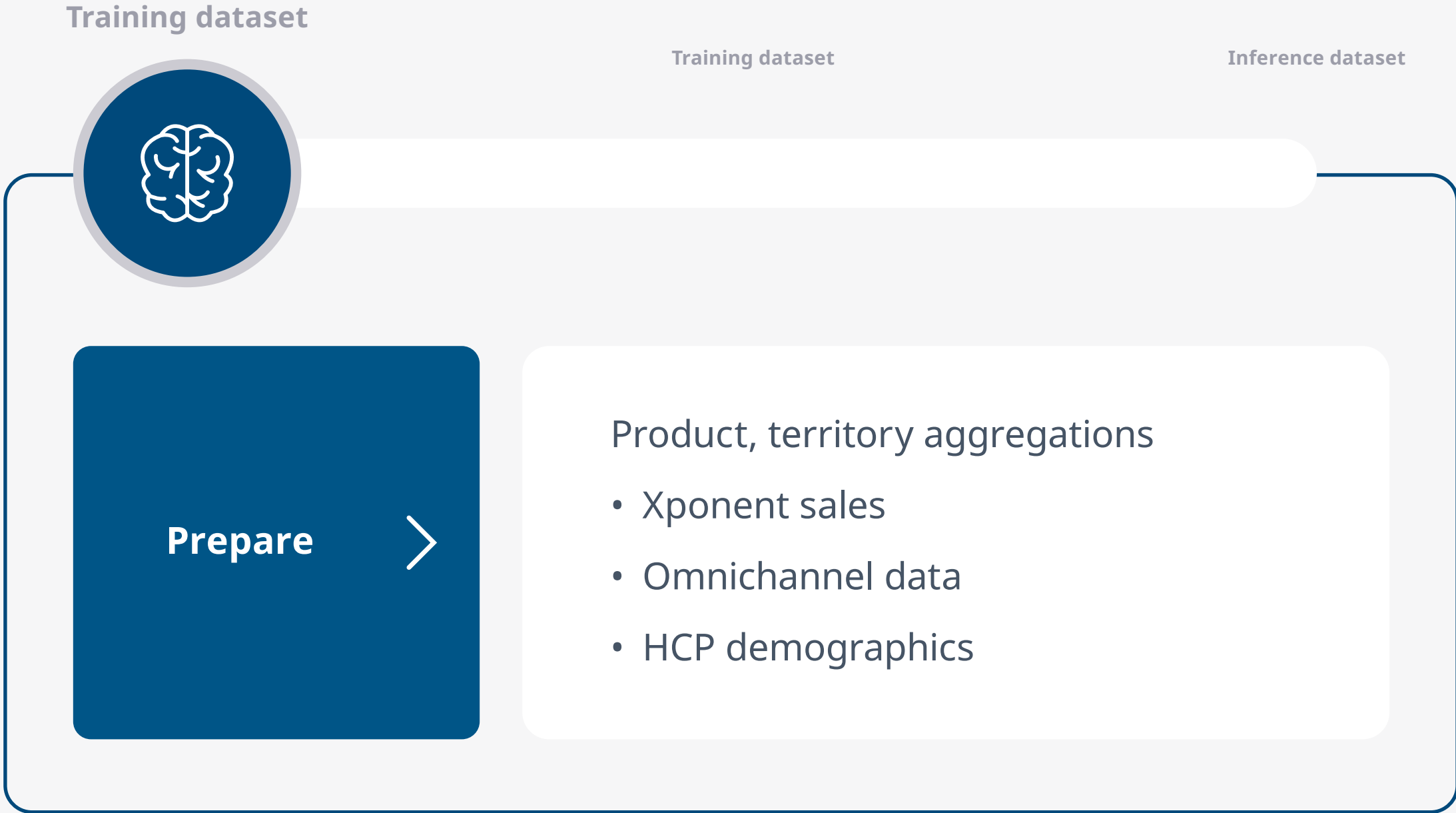
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IQVIA Next Best Sequence

IQVIA Next Best Sequence

Once sales reps are equipped with the right message and content for a specified HCP, IQVIA Next Best Sequence can evaluate previous engagements to determine the optimal order of outreach activities. For example, the algorithm may suggest sending a follow up email after a HCP has attended a webinar.

By using AI/ML-enabled decision-making, sales reps can optimize engagement sequences across personal and digital channels, leading to seamless omnichannel experiences and accelerated sales cycles.

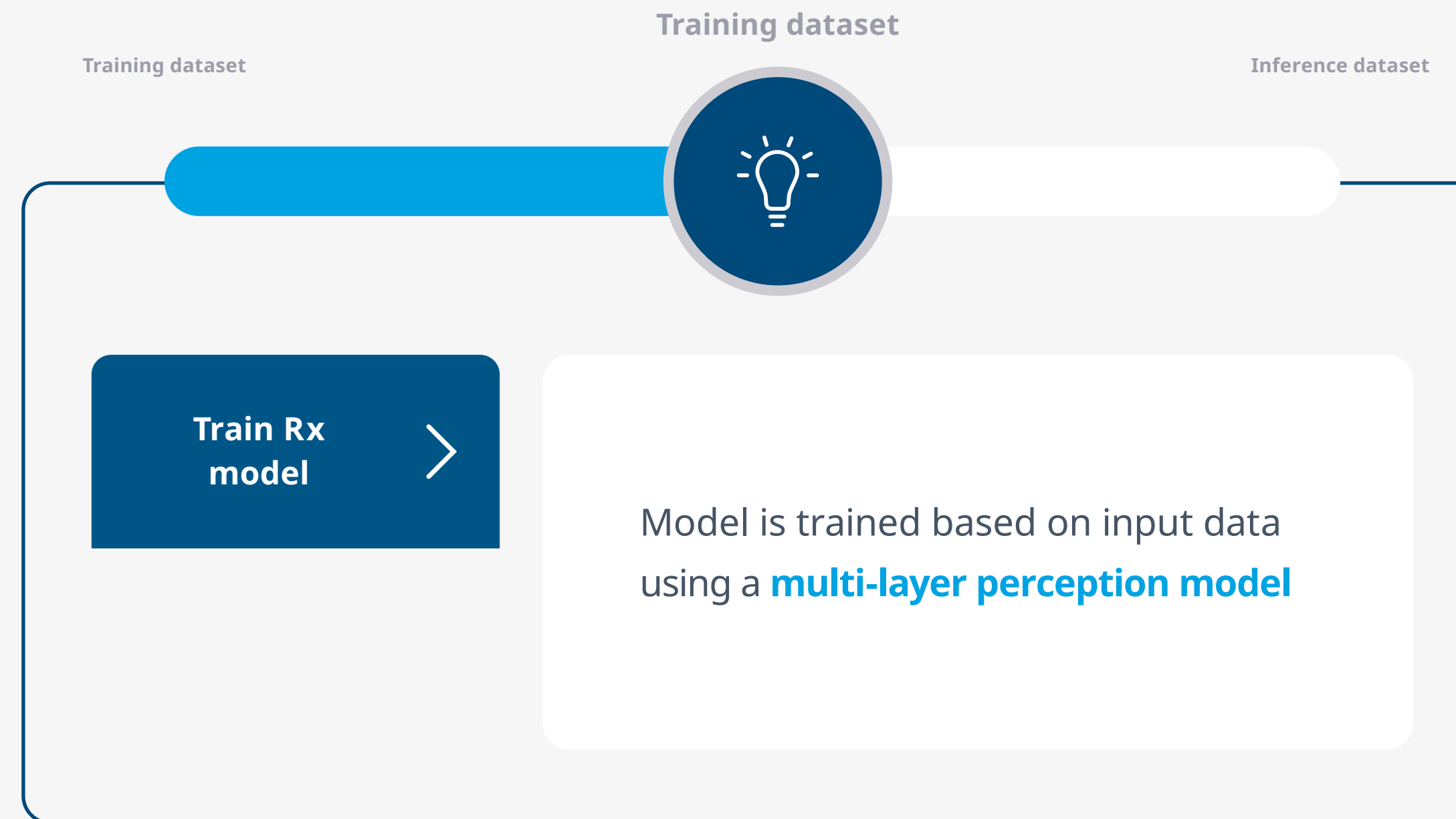


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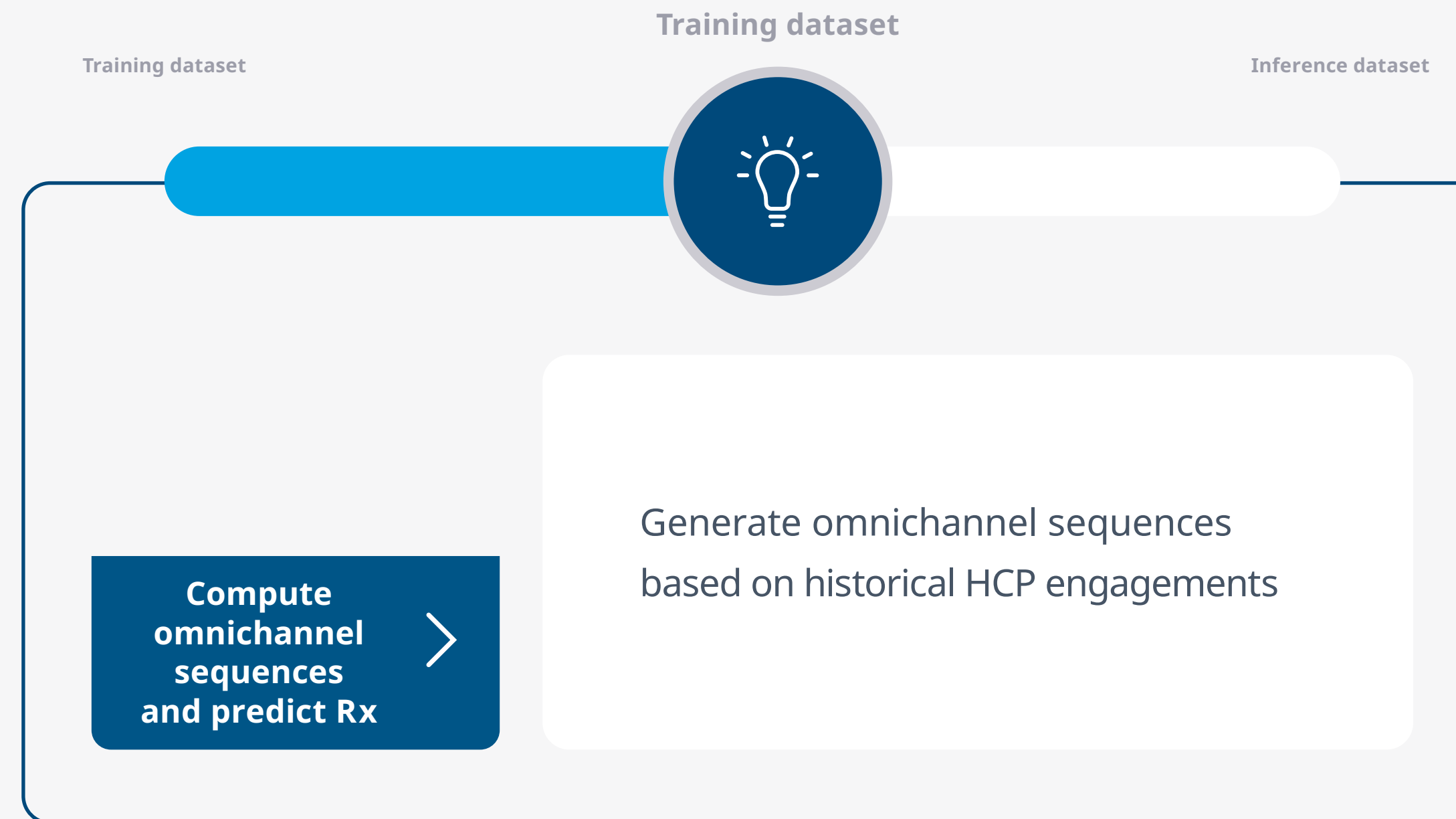


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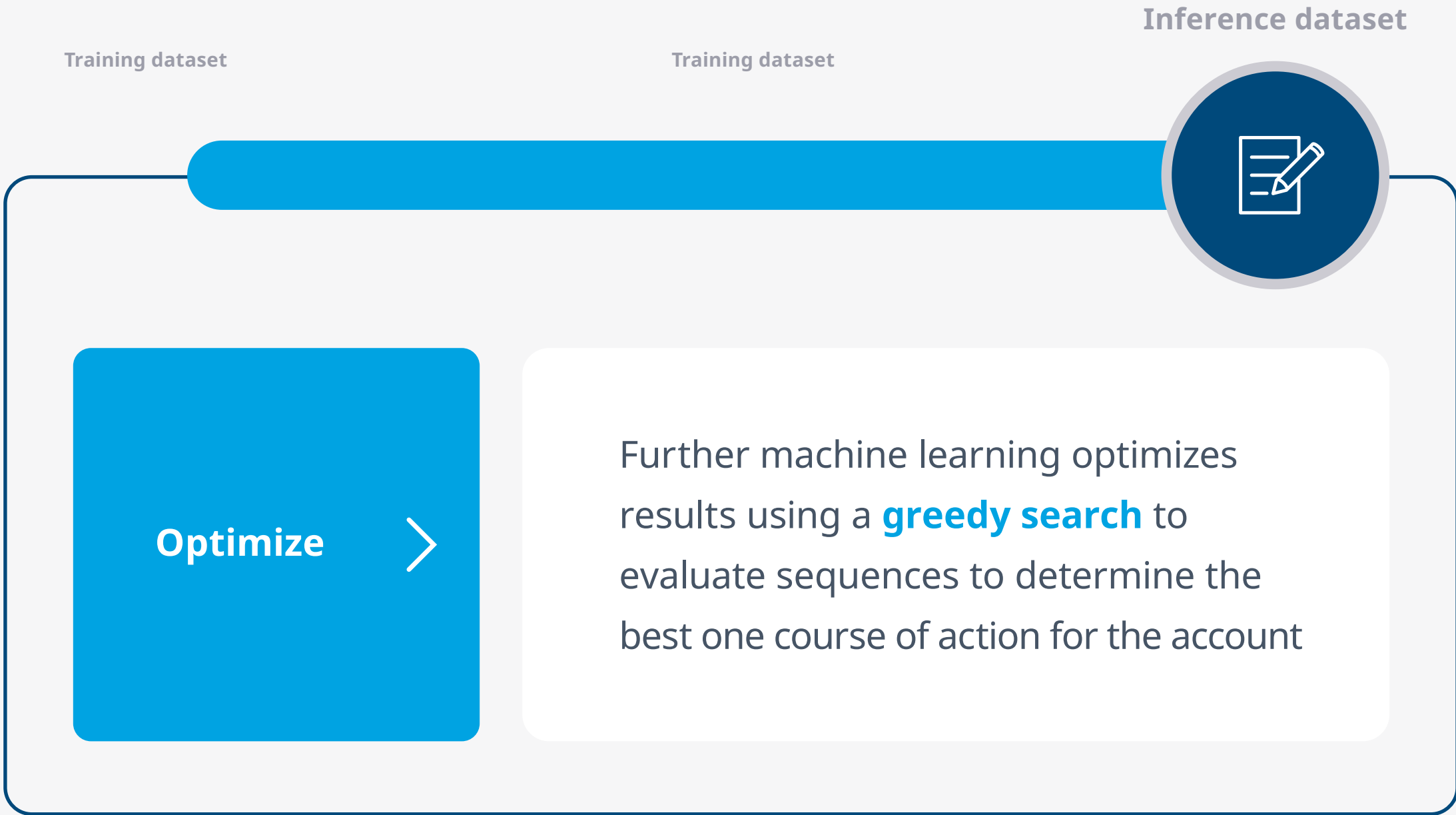


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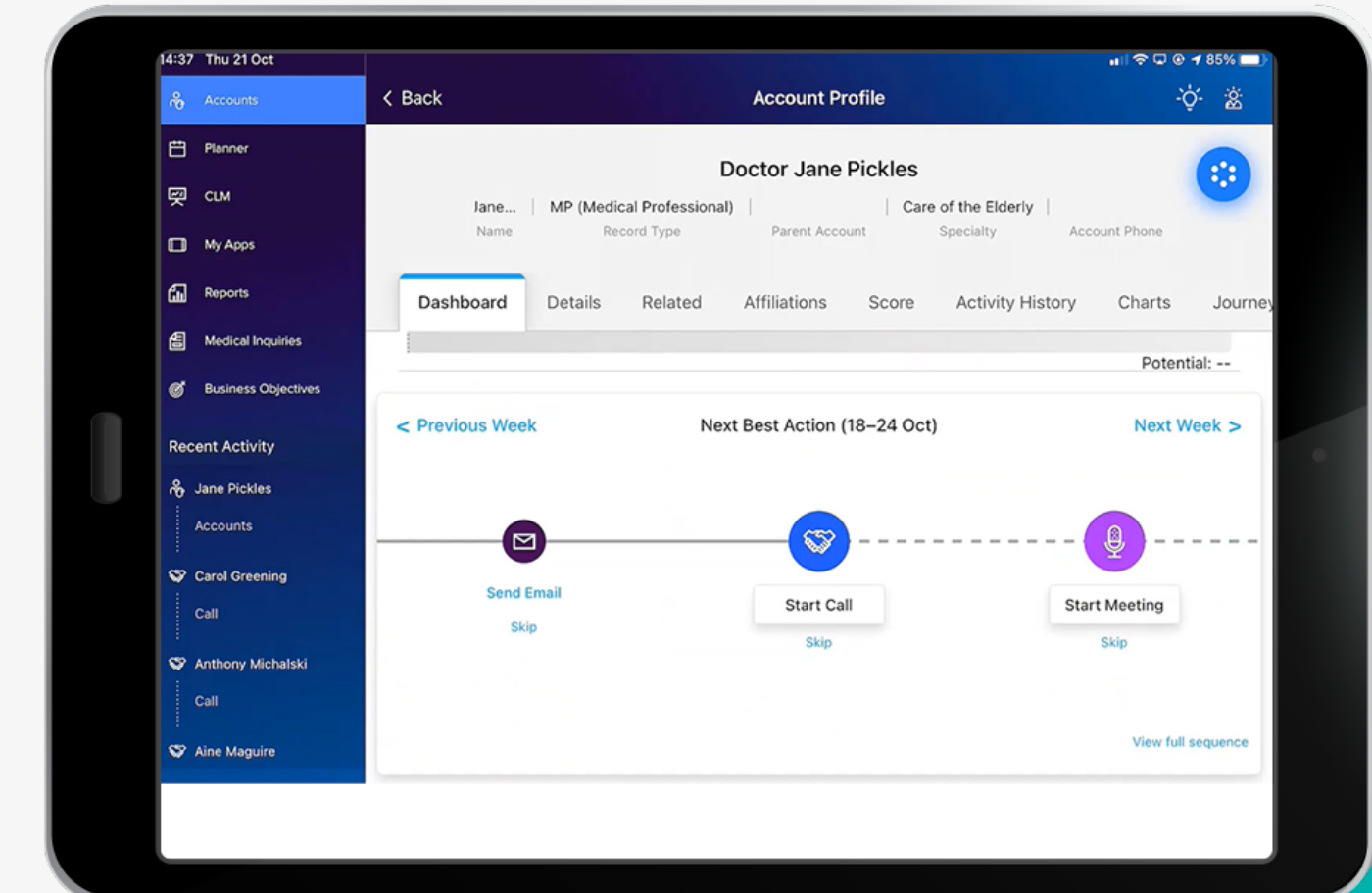
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IQVIA Next Best Sequence

How it works

- 1 Xponent sales data, omnichannel data, and HCP demographics are aggregated.
- 2 The model is trained based on input data using a multi-layer perception model.
- 3 Omnichannel sequences are generated based on historical HCP engagements.
- 4 The best action for each specific account is generated from the results. Further machine learning using a greedy algorithm evaluates various sequences to determine the best course of action for the account.

Greedy algorithm: An algorithm that selects the best possible option at that precise moment, even if doing so means missing better choices later on.



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IQVIA Next Best Customer

IQVIA Patient Triggers

How it works

1

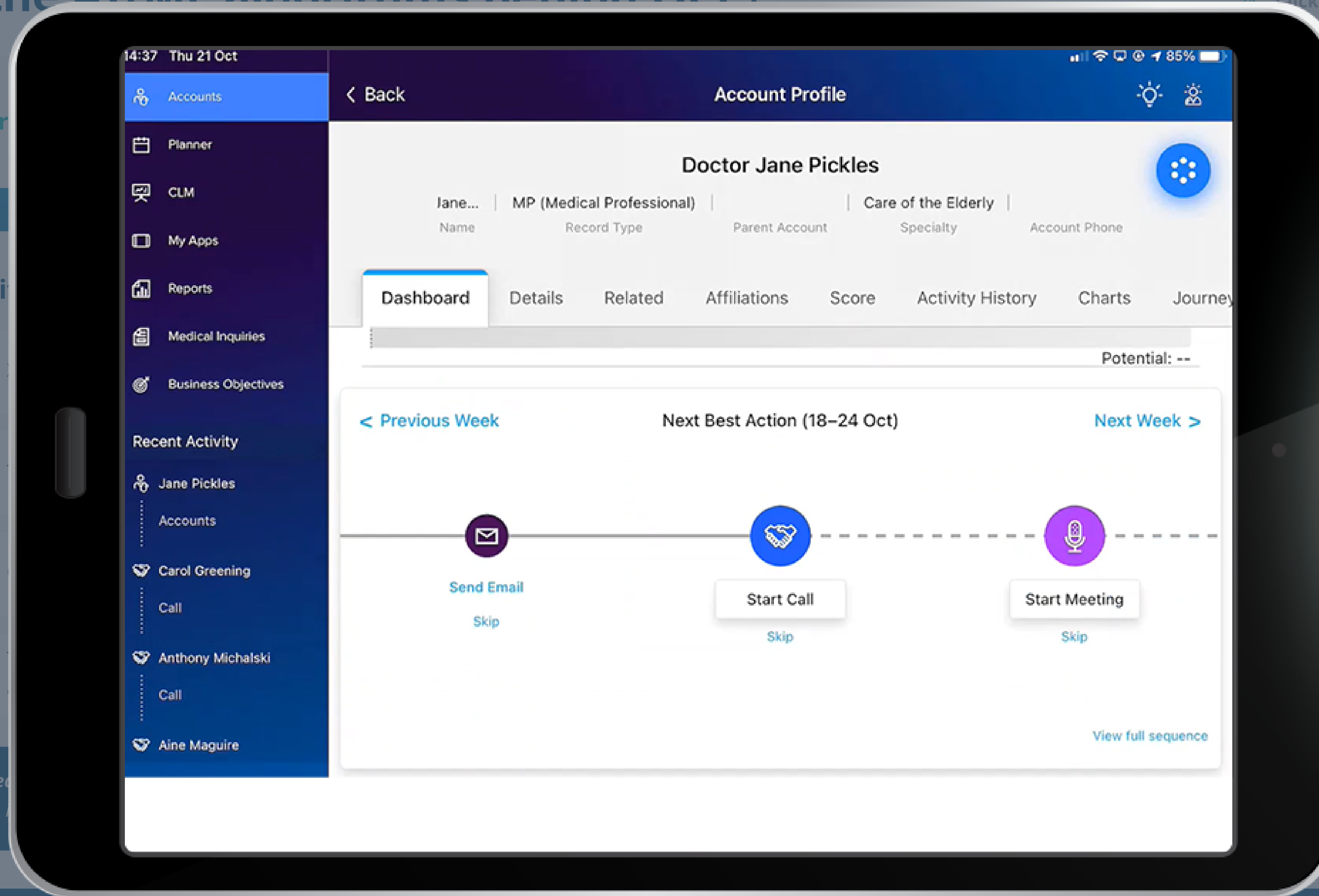
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Back

Green even



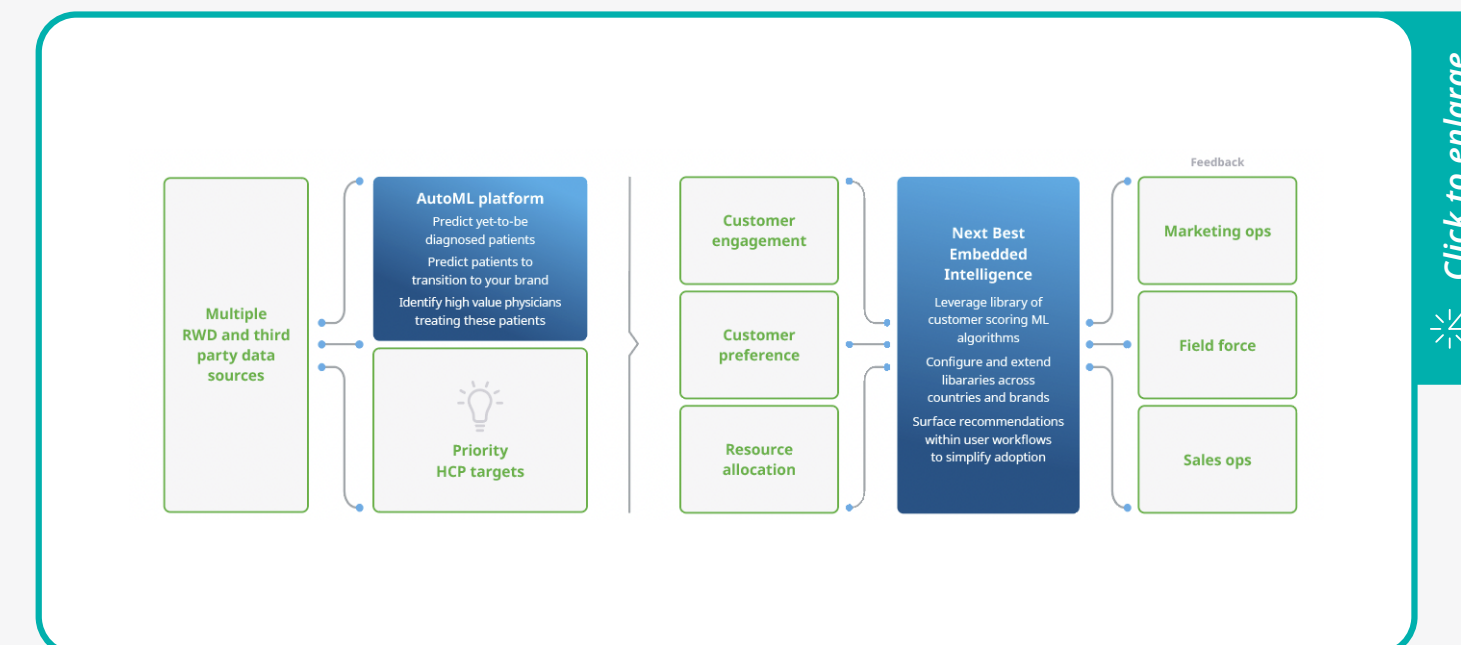
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IQVIA Patient Triggers

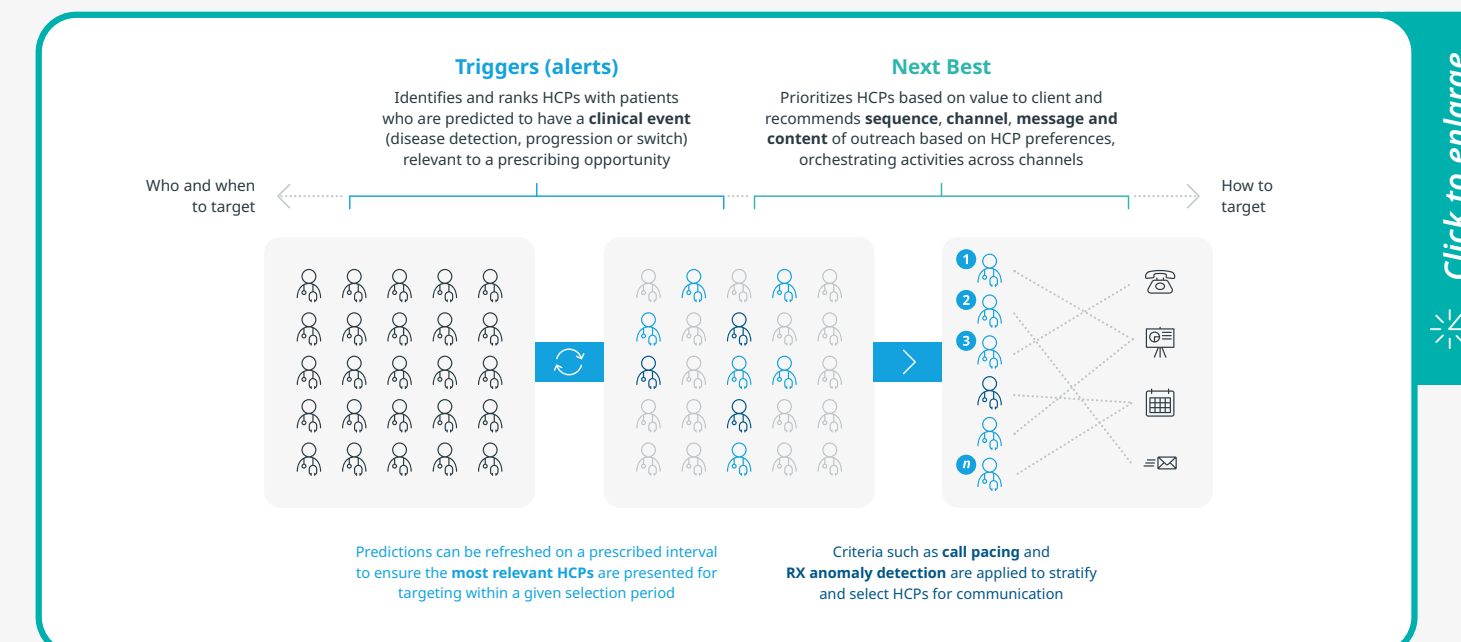
IQVIA Patient Triggers

Using anonymized electronic medical record (EMR) data, IQVIA Patient Triggers can help uncover and predict patients at risk of disease or condition progression, allowing sales reps to proactively recommend alternative treatment decisions and brands at a time that heavily benefits both the patient and physician.

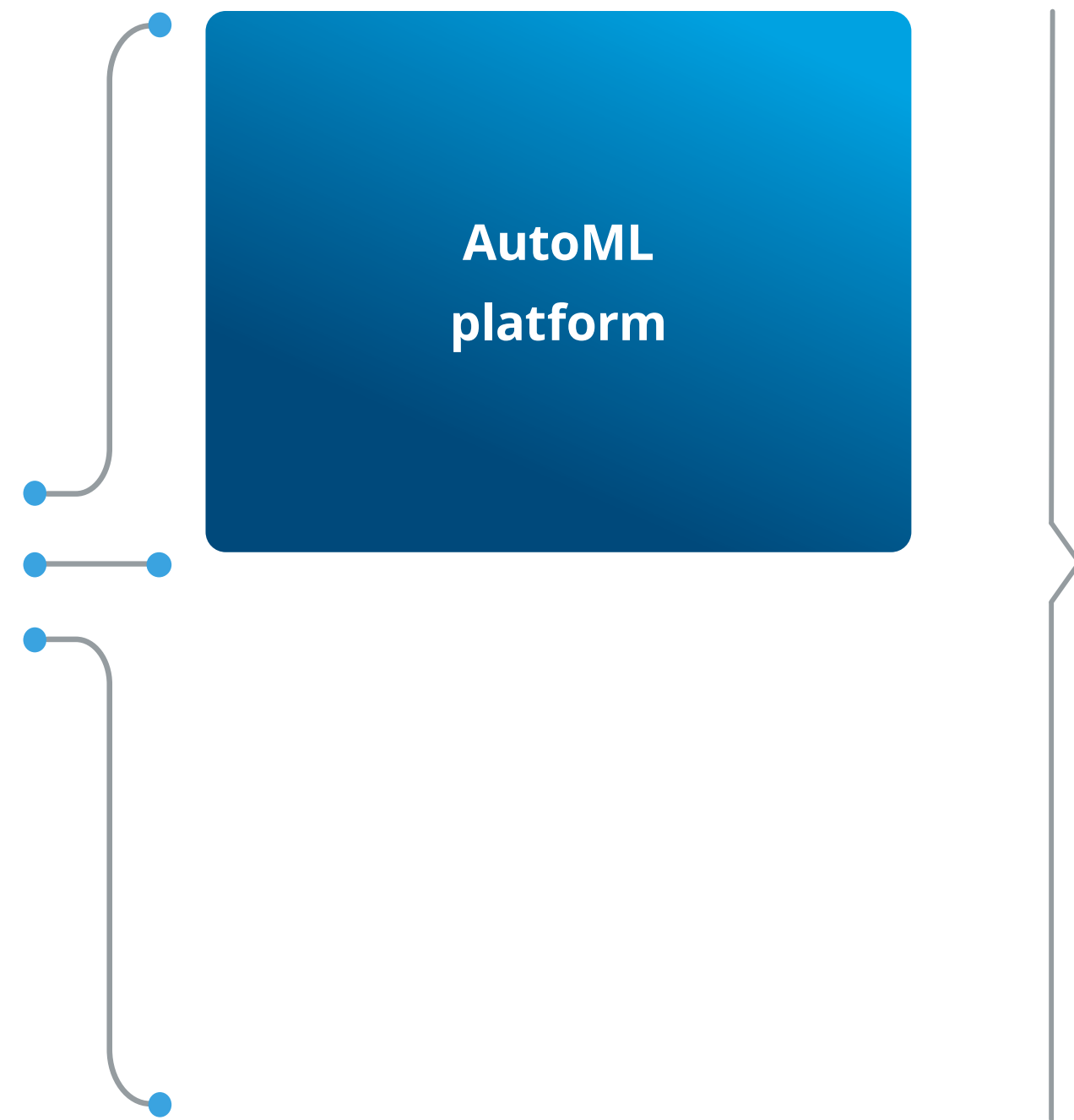
Combining Patients Triggers with other IQVIA Next Best algorithms provides valuable insights into high-interest patients, their associated HCPs, and the best message, content, and sequence of outreach.

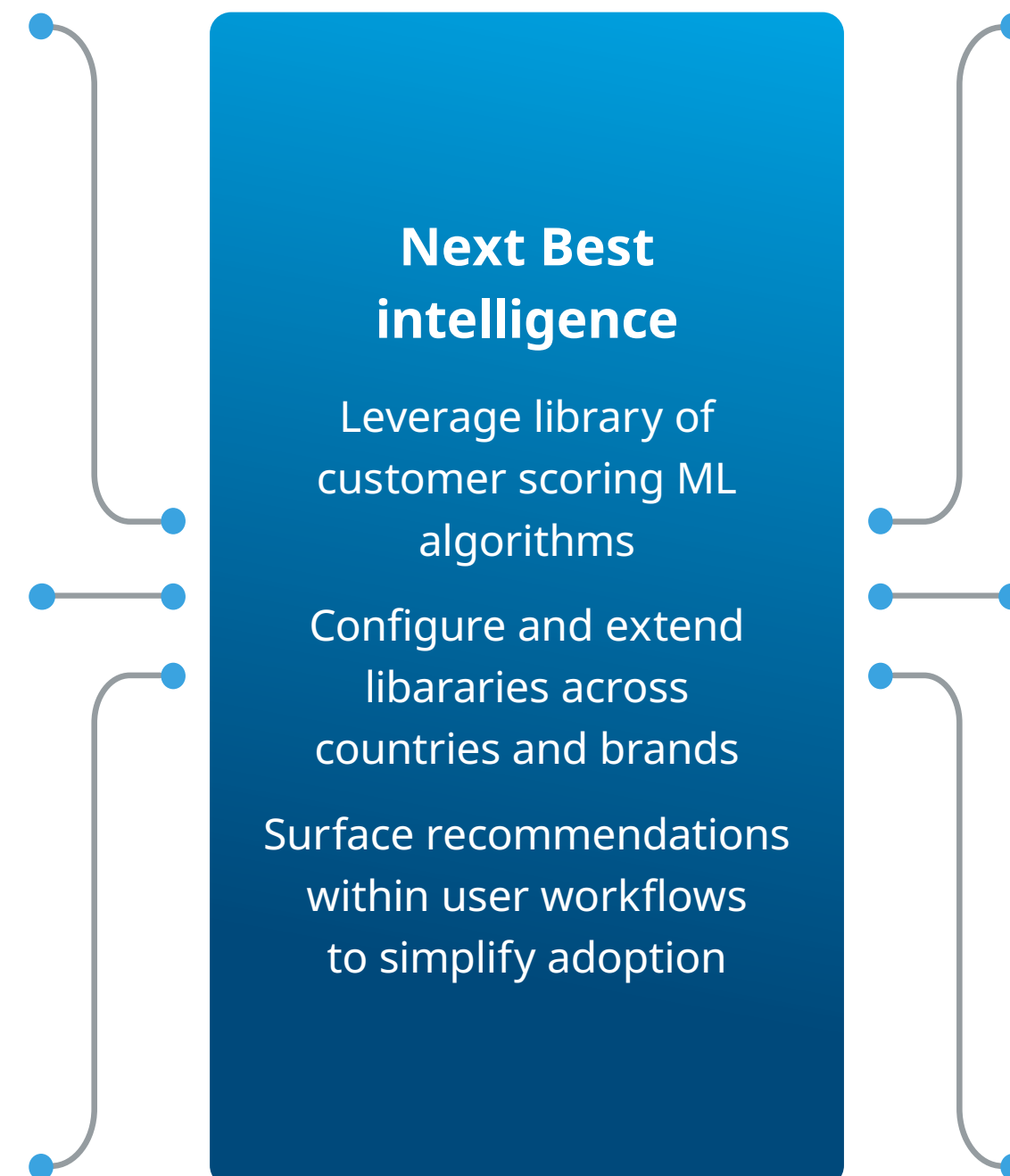
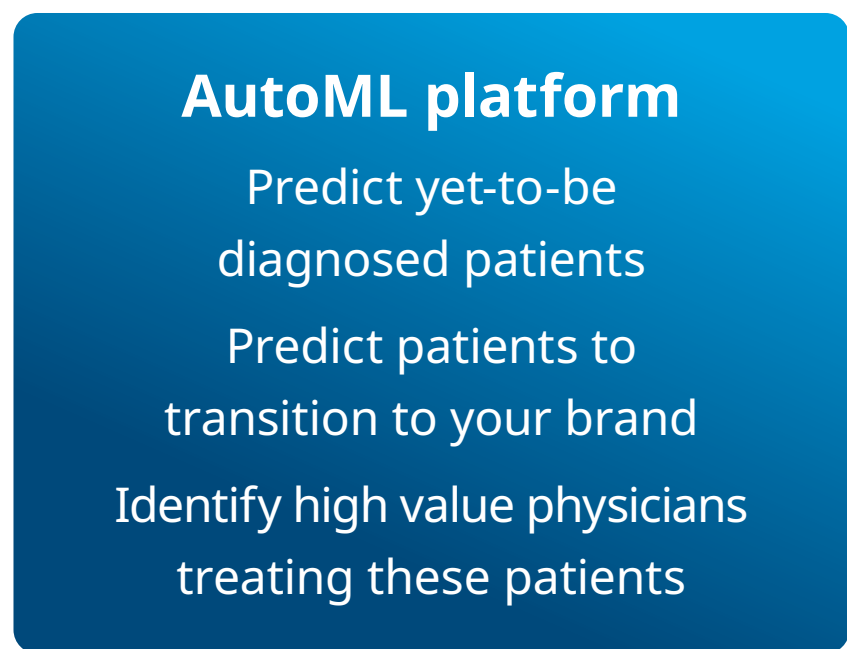
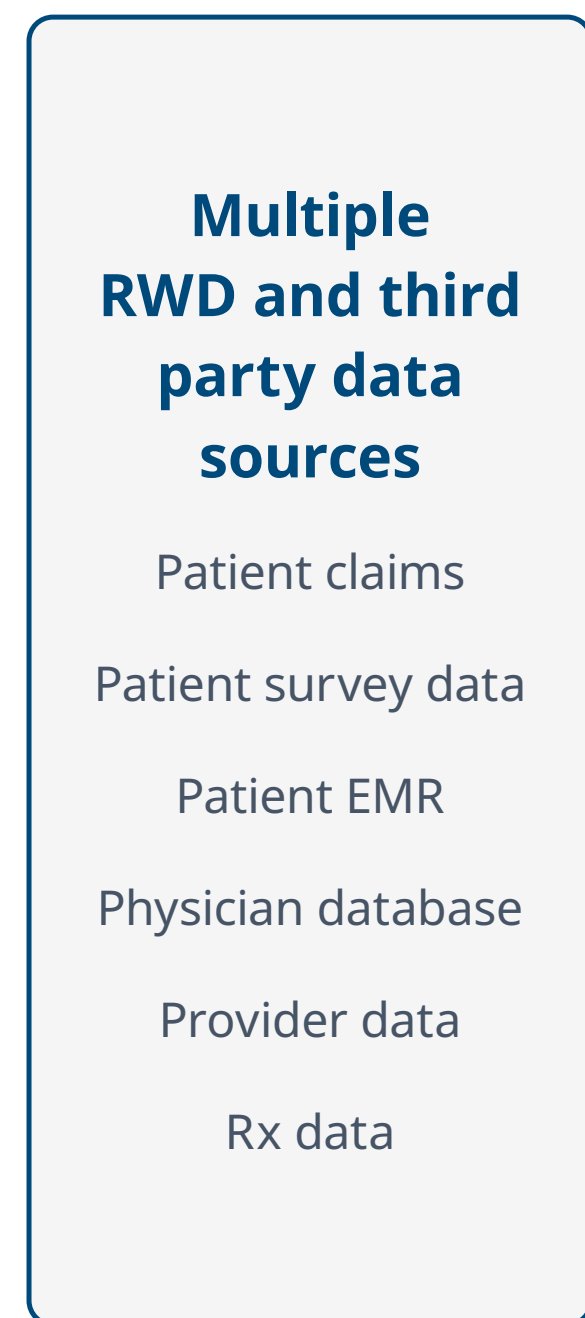


Click to enlarge



Click to enlarge





Feedback

Multiple RWD and third party data sources

- Patient claims
- Patient survey data
- Patient EMR
- Physician database
- Provider data
- Rx data

AutoML platform

- Predict yet-to-be diagnosed patients
- Predict patients to transition to your brand
- Identify high value physicians treating these patients



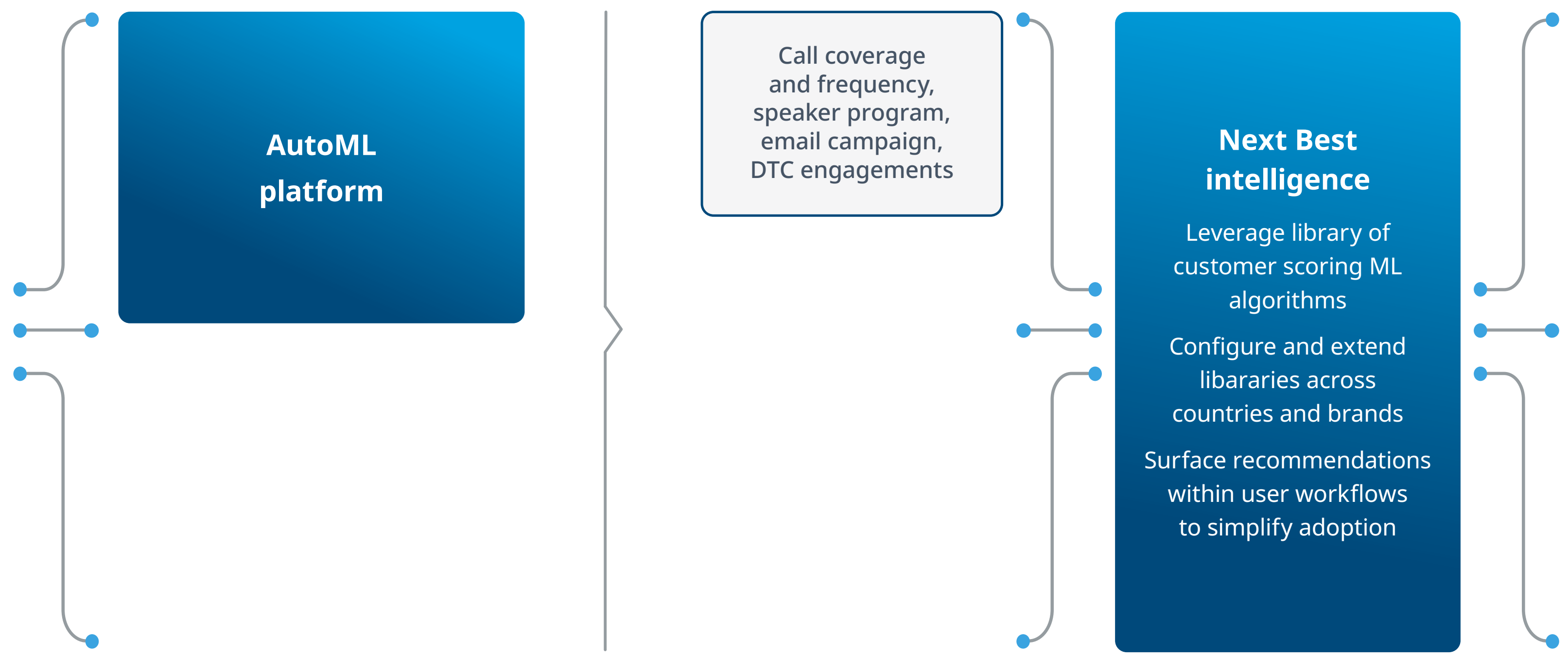
Priority HCP targets

based on predictive modeling of eligible patient cohorts and sub-national sales

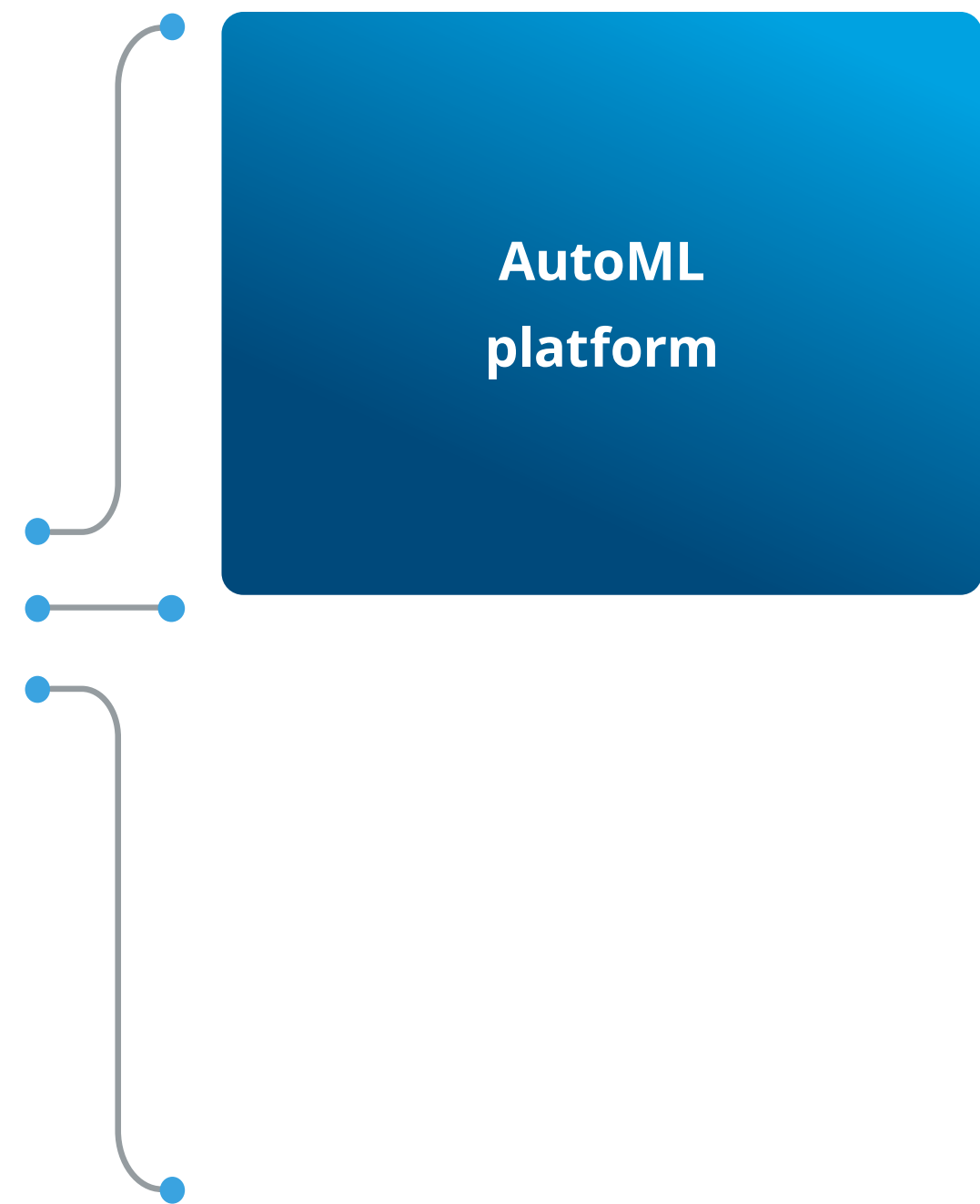
Next Best intelligence

- Leverage library of customer scoring ML algorithms
- Configure and extend libraries across countries and brands
- Surface recommendations within user workflows to simplify adoption

Feedback



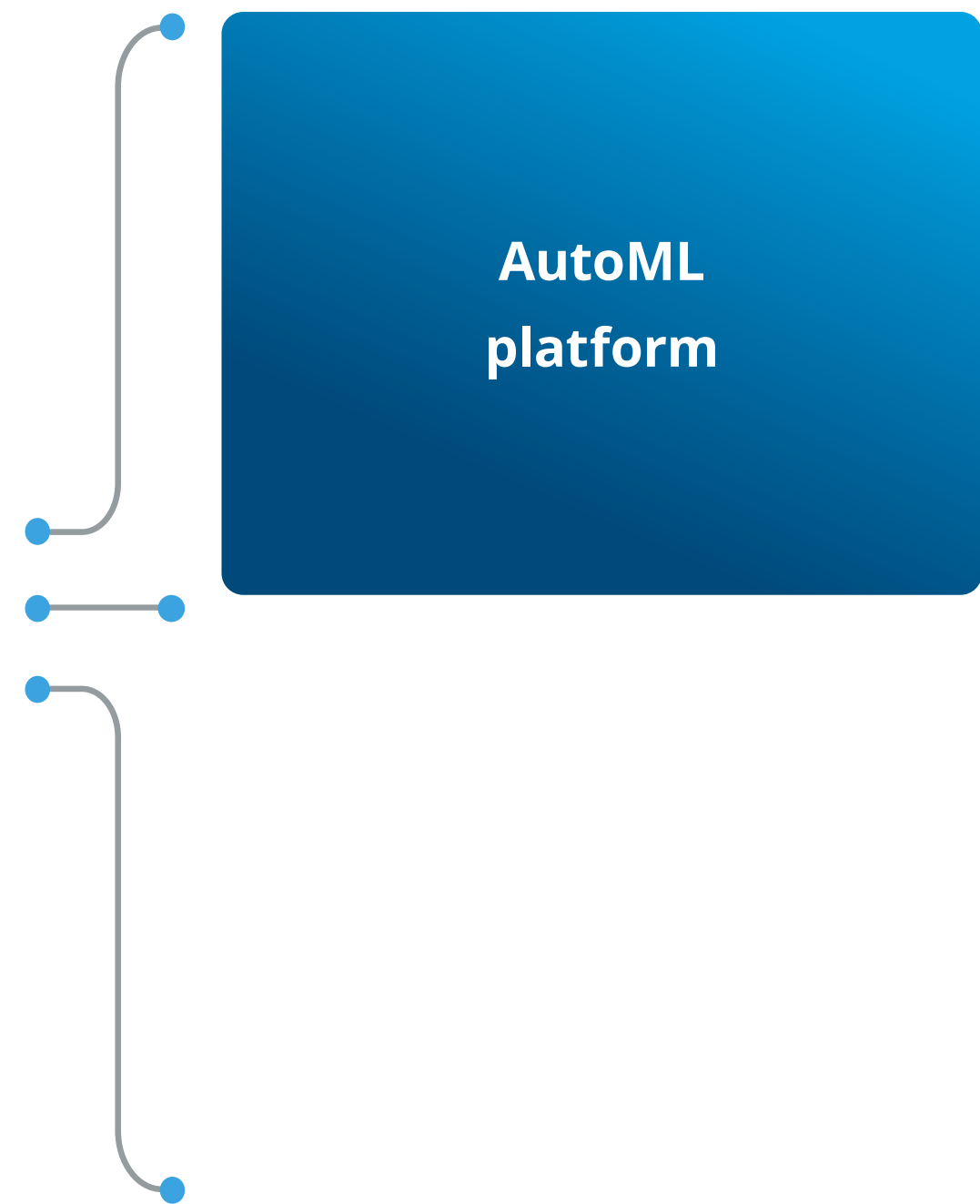
Feedback



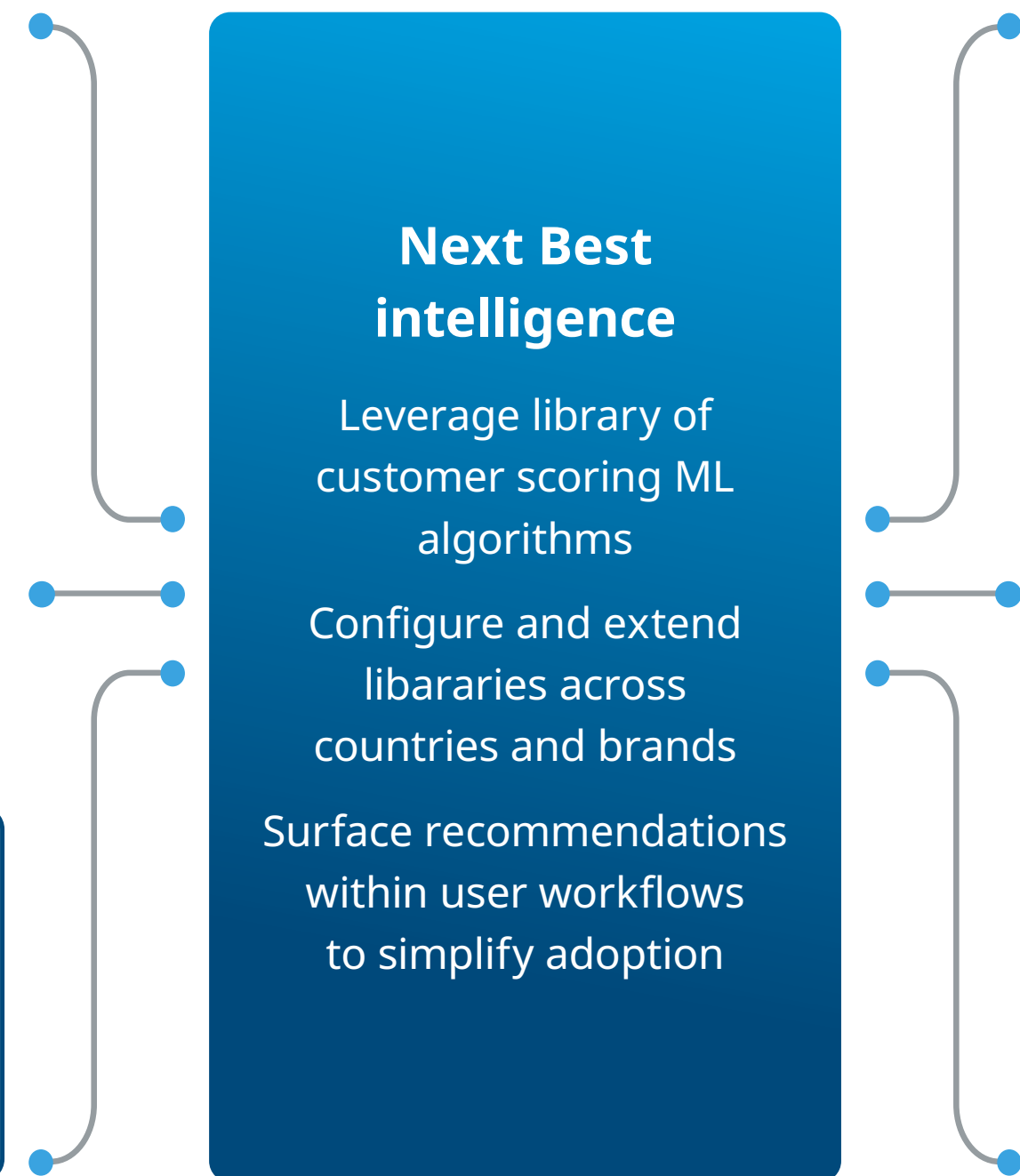
Social media, KOLs, influence, prescription behavior, attitudinal, NPS, channel preferences, socio-economic



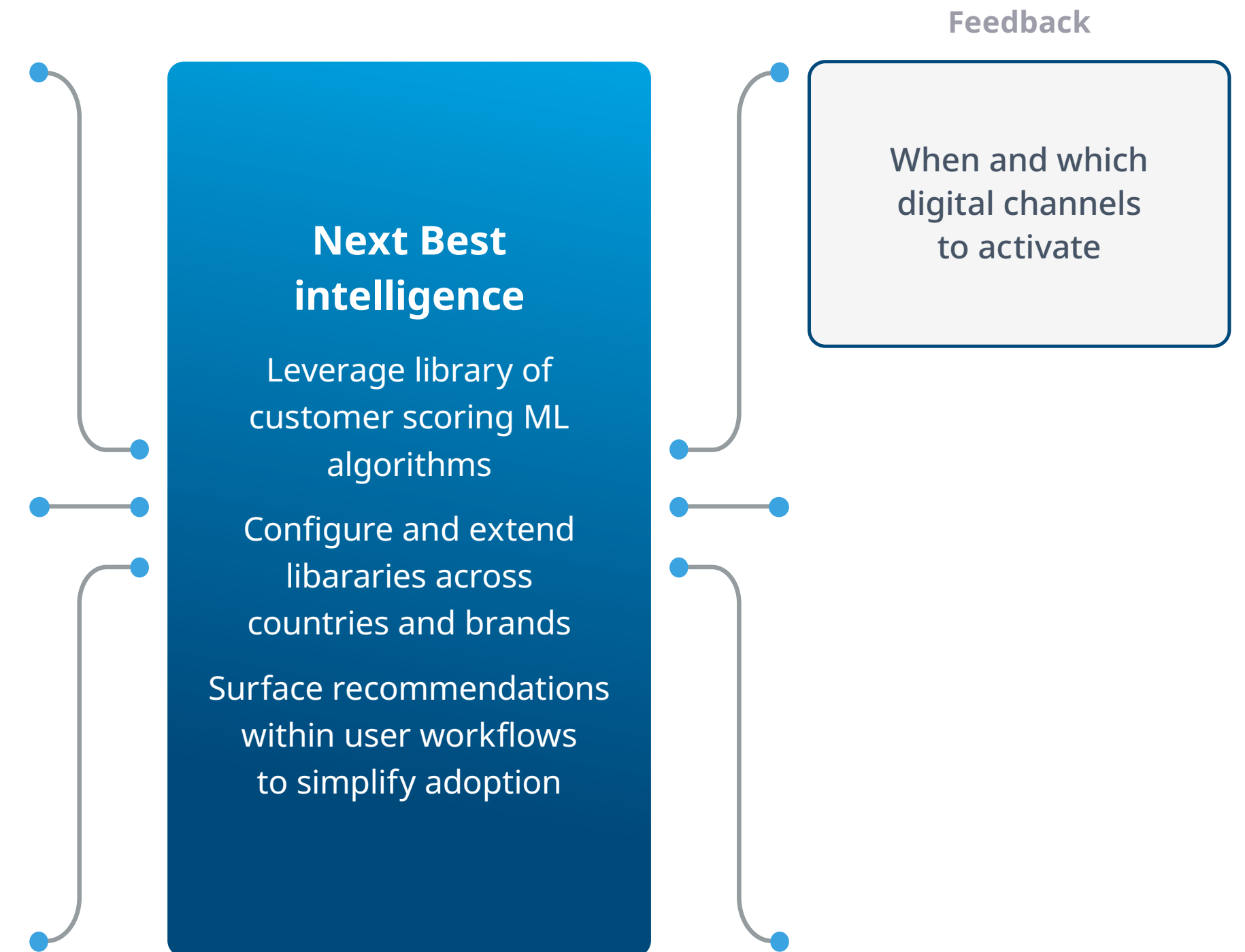
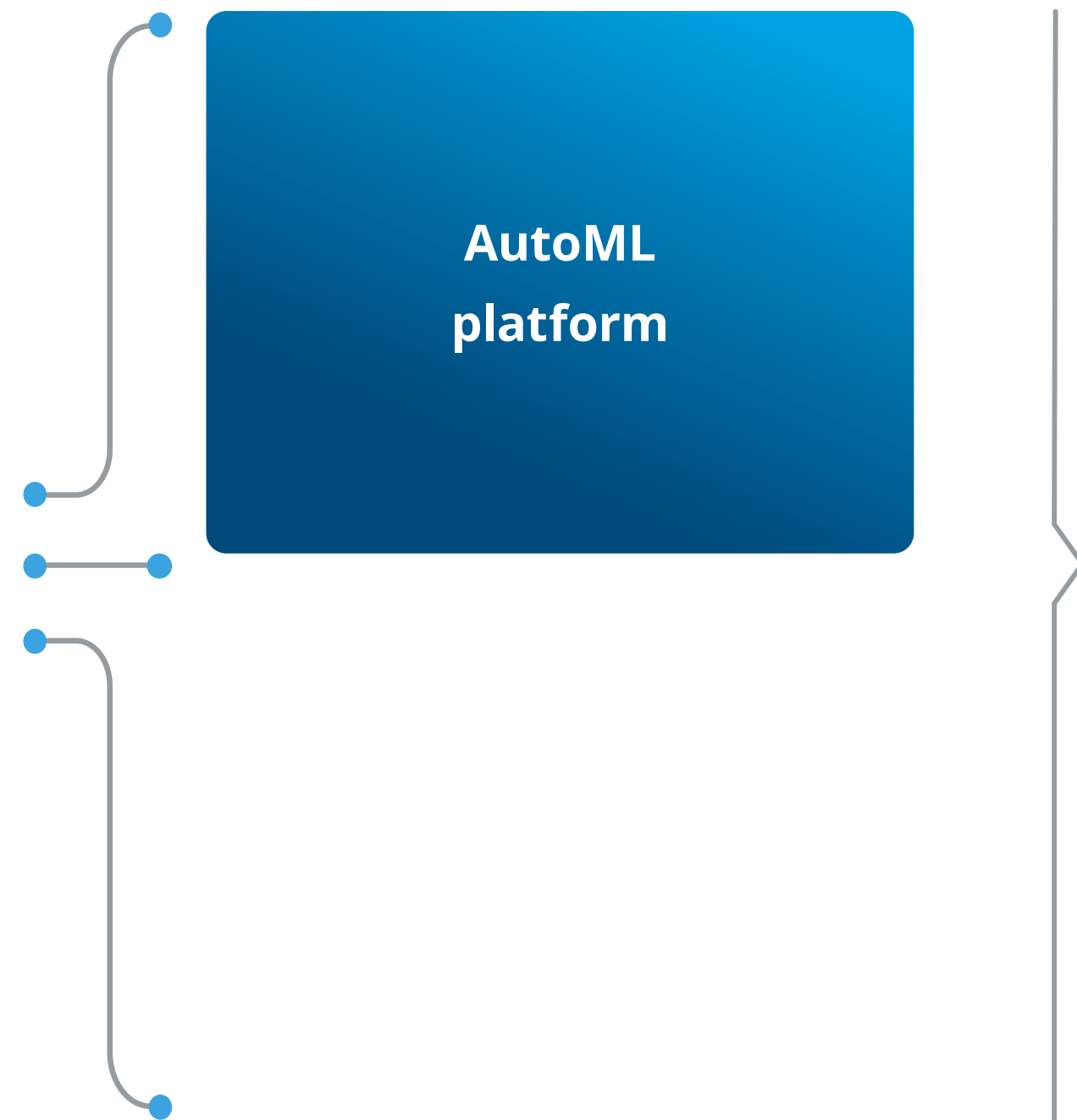
Feedback

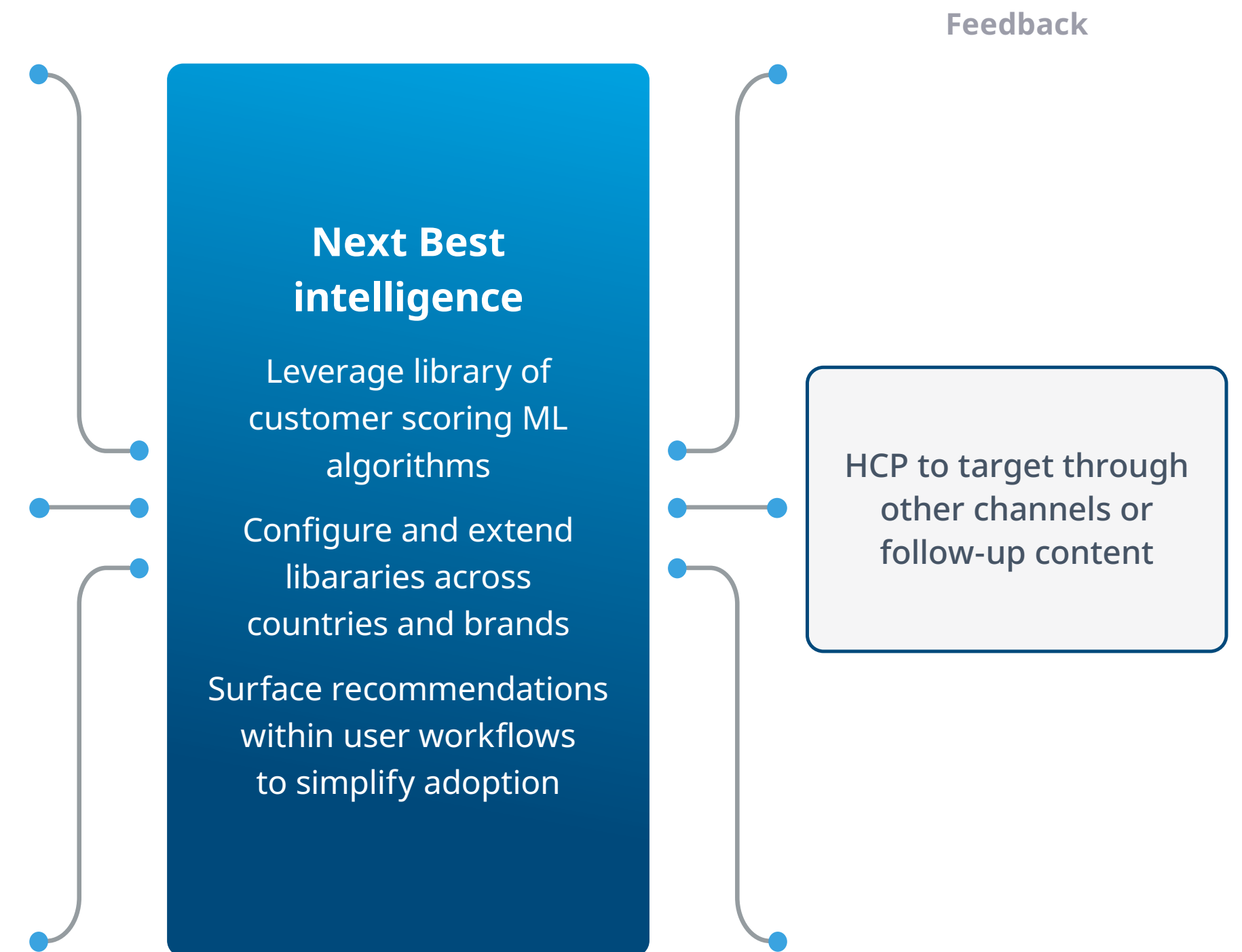
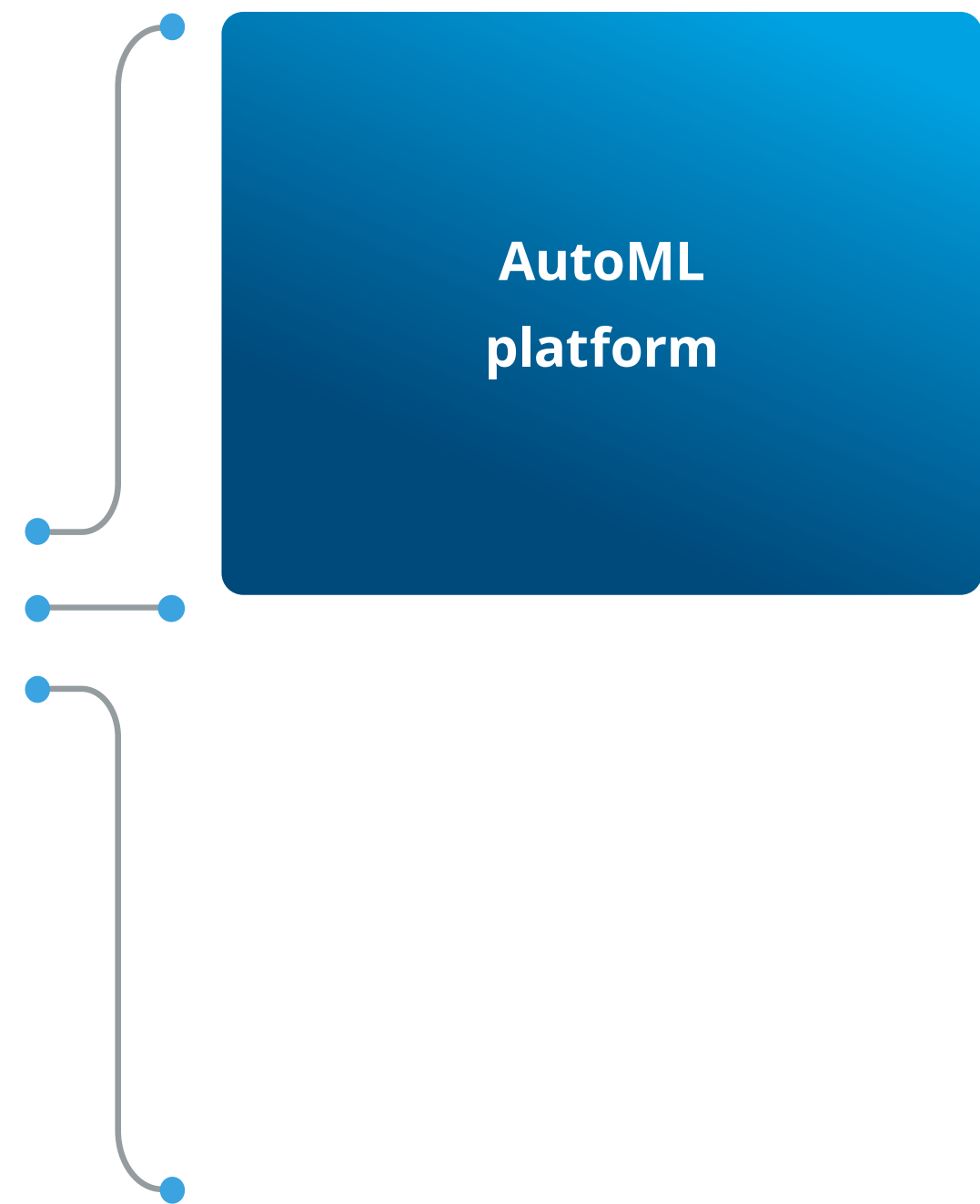


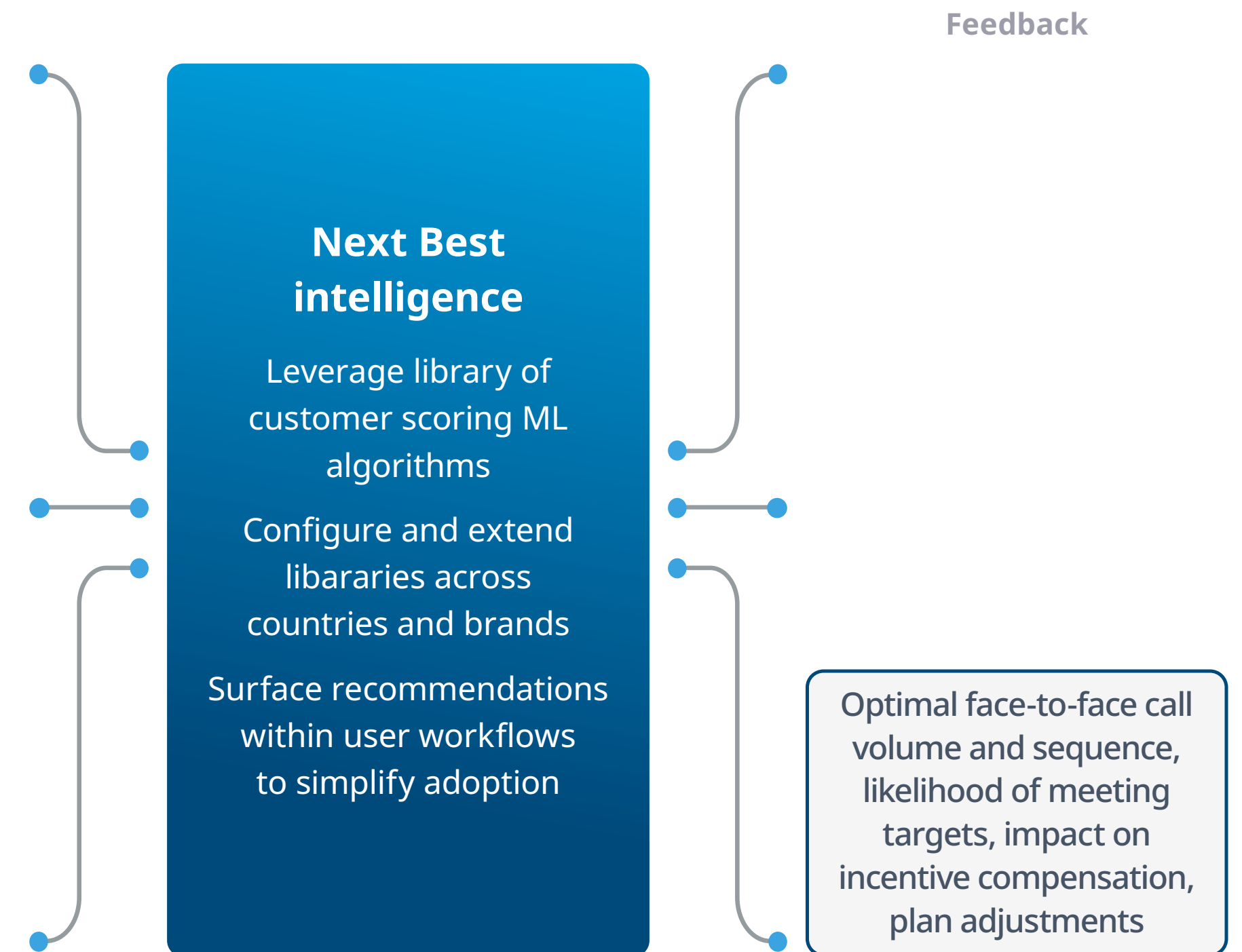
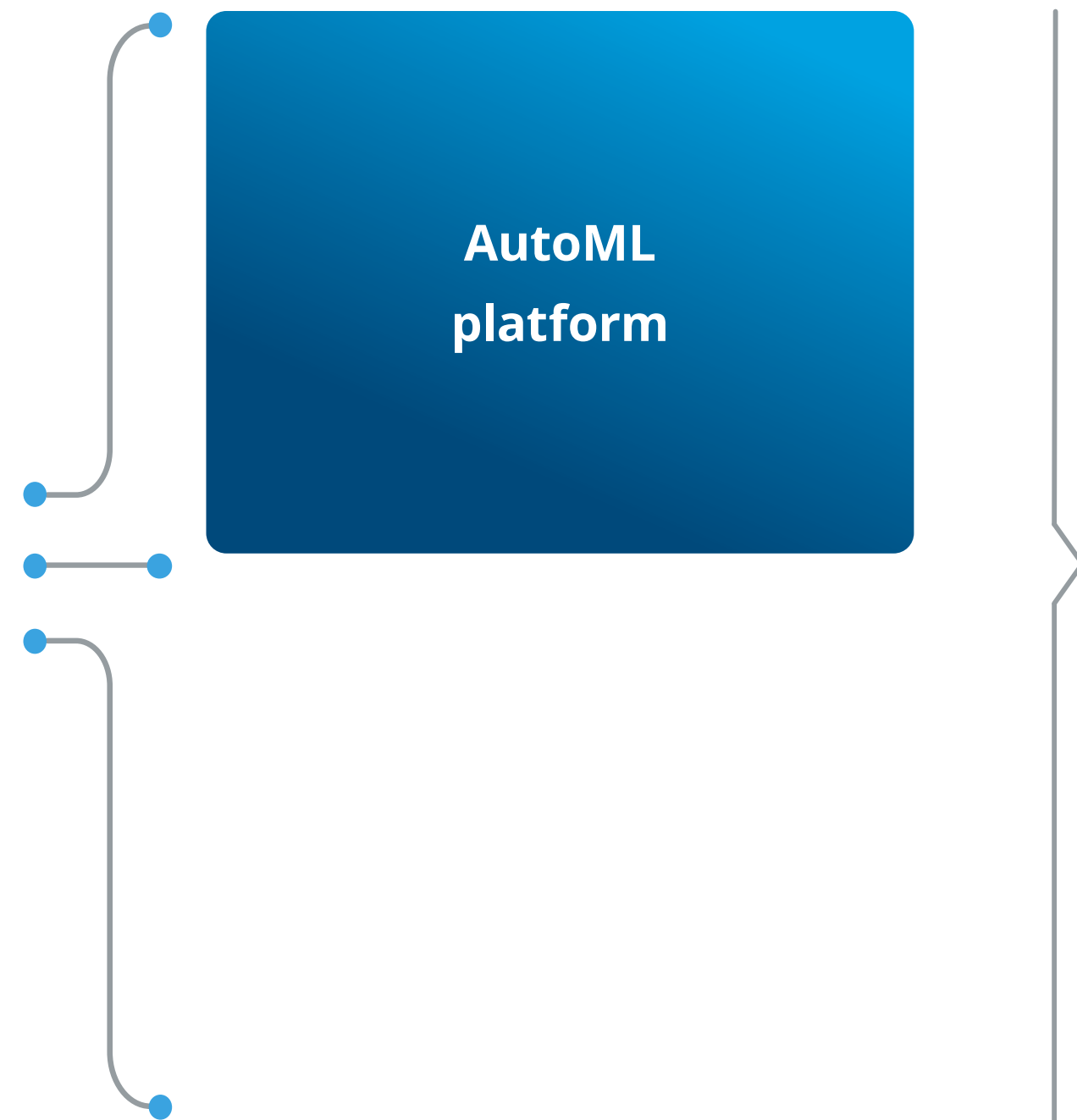
Budget allocation per channel, roster and alignments, call plan, goals/targets/forecast



Feedback







Triggers (alerts)

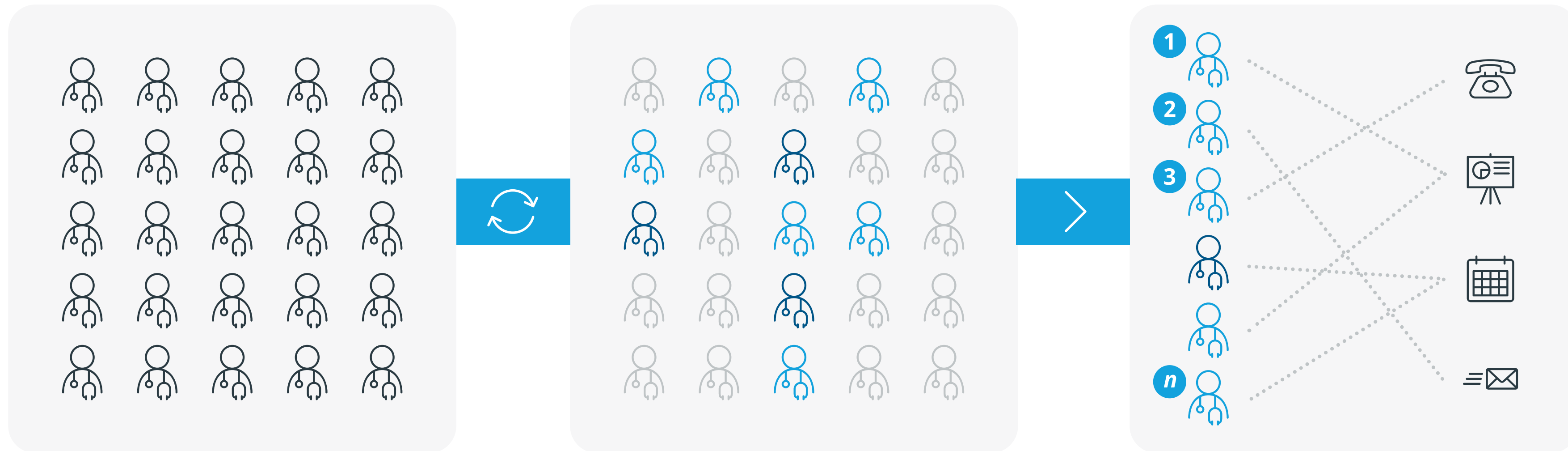
Identifies and ranks HCPs with patients who are predicted to have a **clinical event** (disease detection, progression or switch) relevant to a prescribing opportunity

Next Best

Prioritizes HCPs based on value to client and recommends **sequence, channel, message and content** of outreach based on HCP preferences, orchestrating activities across channels

Who and when to target

How to target



Predictions can be refreshed on a prescribed interval to ensure the **most relevant HCPs** are presented for targeting within a given selection period

Criteria such as **call pacing** and **RX anomaly detection** are applied to stratify and select HCPs for communication

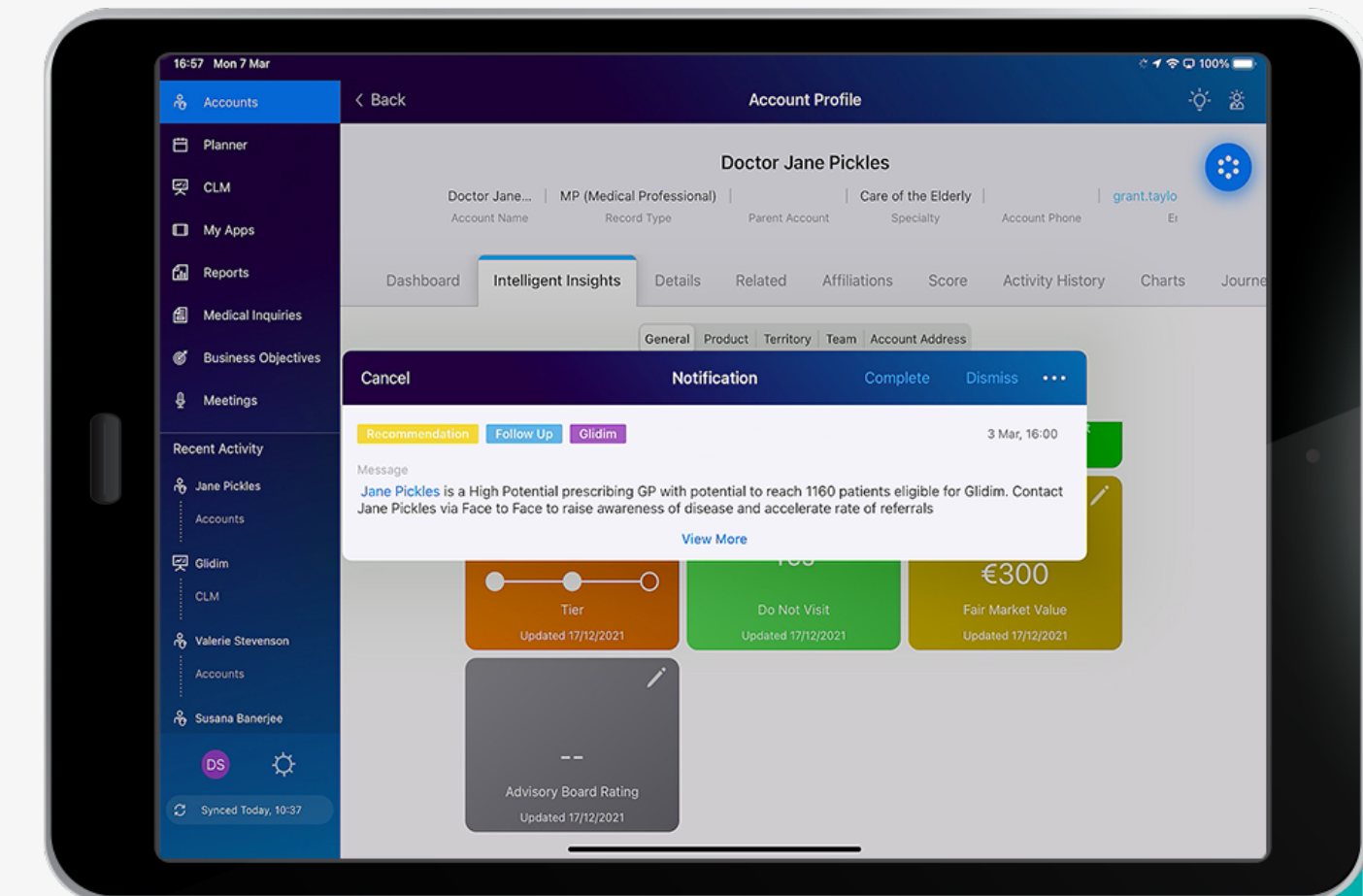
Discover the AI/ML algorithms behind OCE+

Click teal components to reveal

IQVIA Patient Triggers

How it works

- 1 Multiple real-world data (RWD) and third-party data sources, including patient claims, patient EMR, and physician database, are collected and held in the AutoML platform.
- 2 These RWD sources are aggregated to predict yet-to-be diagnosed patients, patients that are likely to transition to or from your brand, and the high-value physicians who treat these patients.
- 3 A list of priority HCP targets are generated based on predictive modeling of eligible patient cohorts and sub-national sales.
- 4 Patient triggers and IQVIA Next Best dovetail to provide a complete HCP targeting solution by suggesting how to personalize engagement.



Click to enlarge

Discover the AI/ML algorithms behind OCE+

Click teal components to reveal

IQVIA Next Best Customer

IQVIA Patient Triggers

How it works

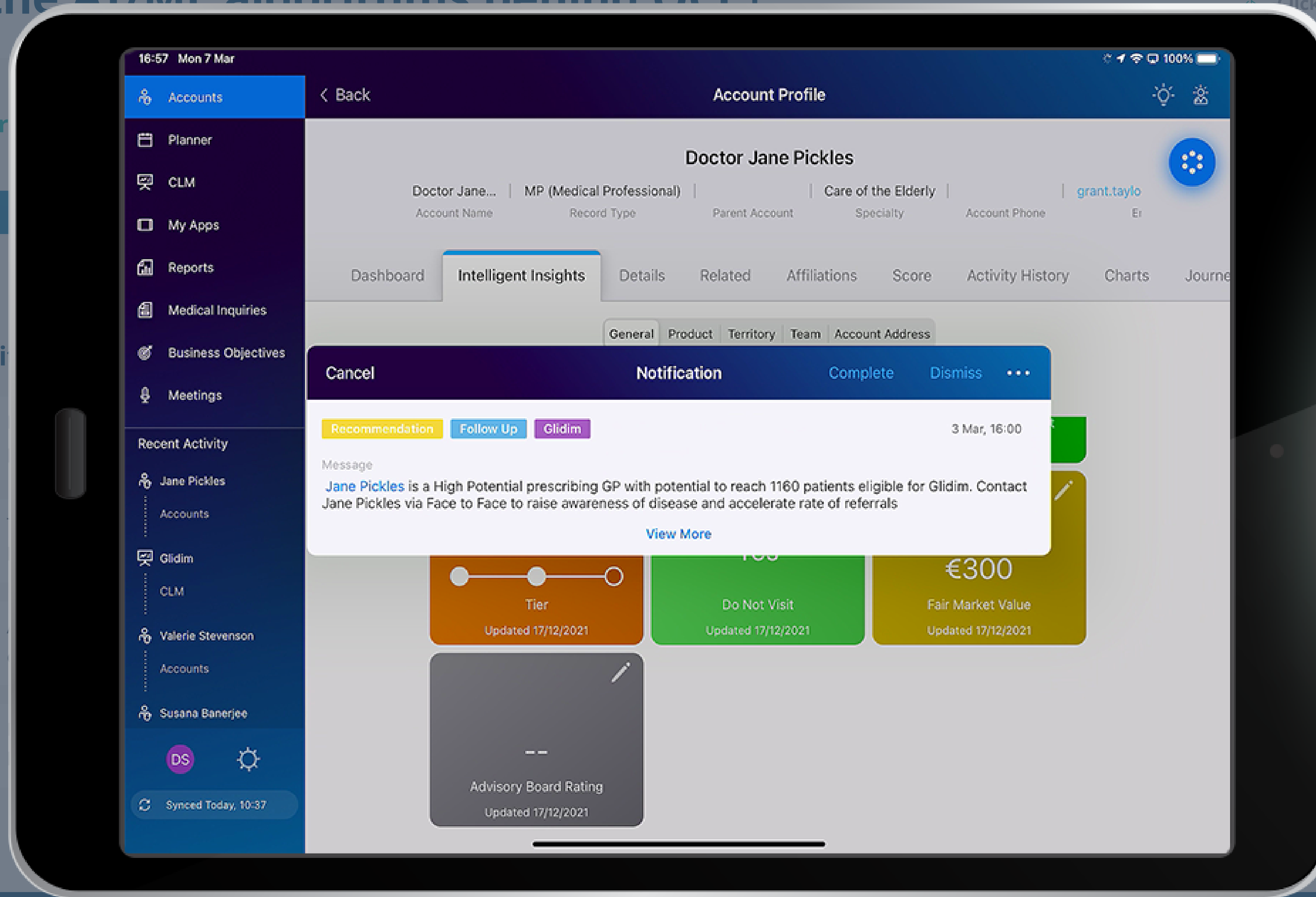
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Click to enlarge

How OCE+ simplifies recommendation adoption

While these algorithms are uniquely useful and insightful on their own, they are incredibly powerful when used in unison. Multiple AI/ML algorithms can be combined to create a single suggestion that is surfaced within persona-based smart workflows with triggers and visual prompts, enabling powerful behavior-changing capabilities that maximize engagement effectiveness and customer satisfaction.

[Watch video](#)

This is what suggestions could look like:

Next Best Customer

SMITH, JOHN

Next Best Channel

Suggested action: Virtual call

Dynamic segmentation

HCP is in this **product segment**.
Your last sales call was on **last call date**.

Next Best Message

Please schedule a call to this HCP for **product segment** with **key message**.

Patient Trigger

This HCP has the right **patient profile** for your brand.

How OCE+ simplifies recommendation adoption

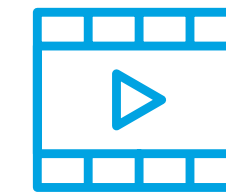
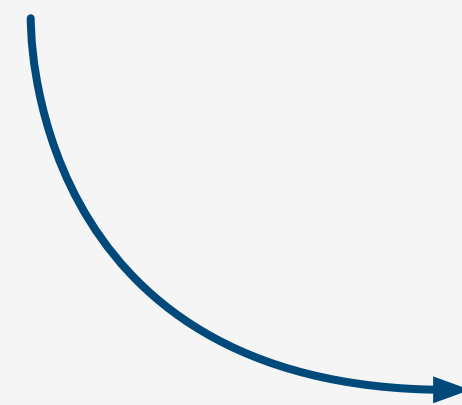
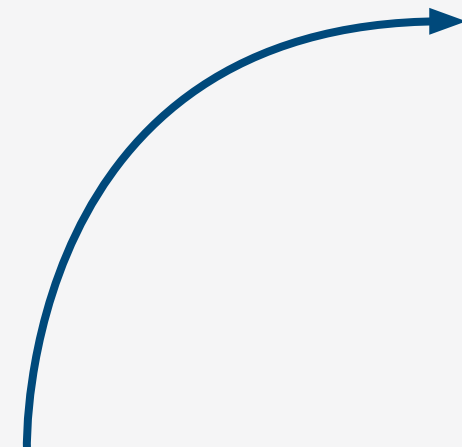
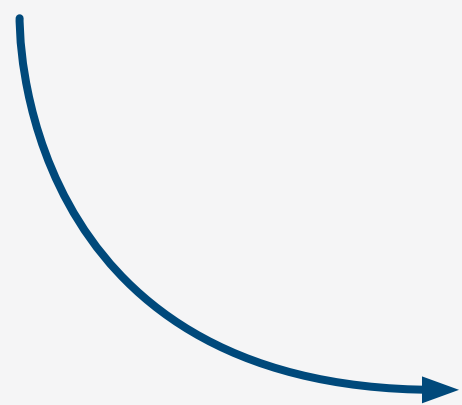
The success of these recommendations relies heavily on how easily they are adopted into sales reps' everyday workflow. For this reason, OCE+ enables disruption-free intelligence, allowing seamless incorporation of precise recommendations within workflows. This helped a top ten pharma client to deliver adoption rates of up to 60% within the first week of implementation.

Learn how insights and recommendations can be integrated together.



William

Pharma sales rep

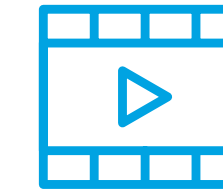
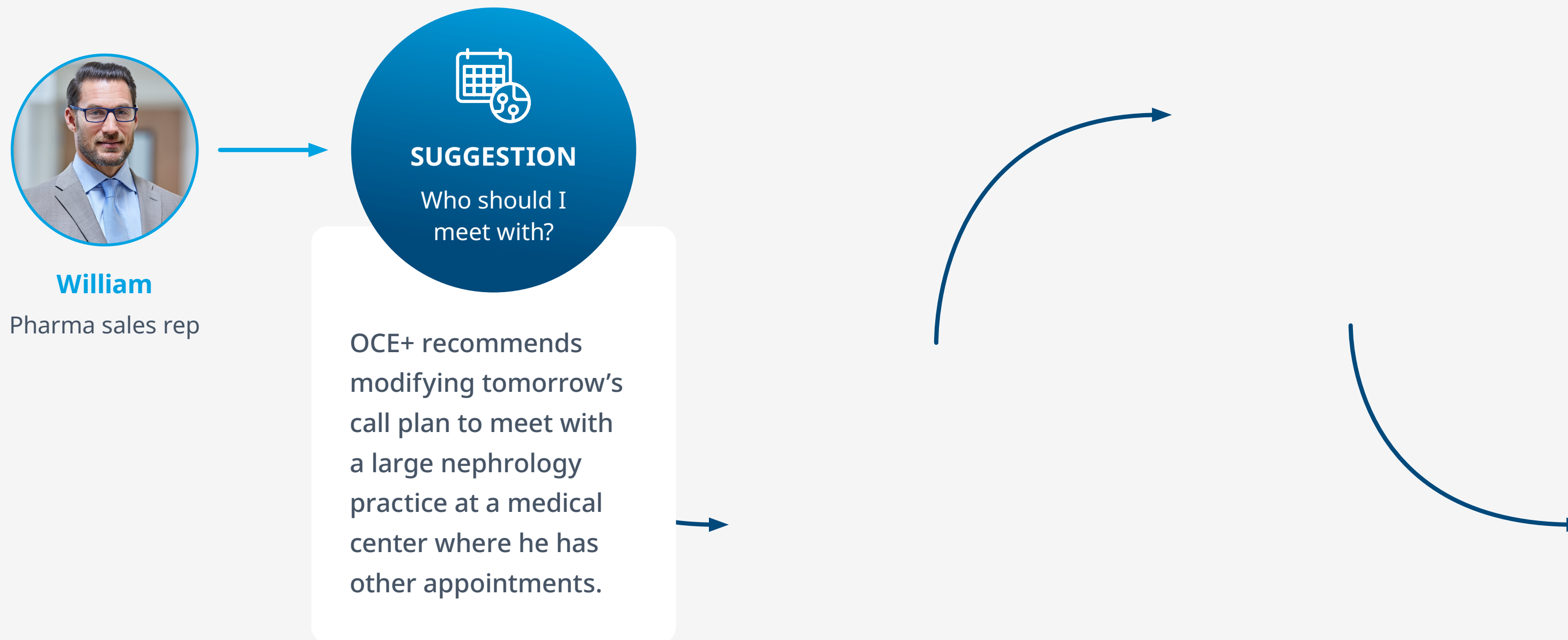


[Watch this video](#) to get a better understanding of just how much value OCE+ can bring to sales reps in a typical day.

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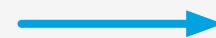
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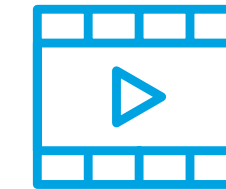
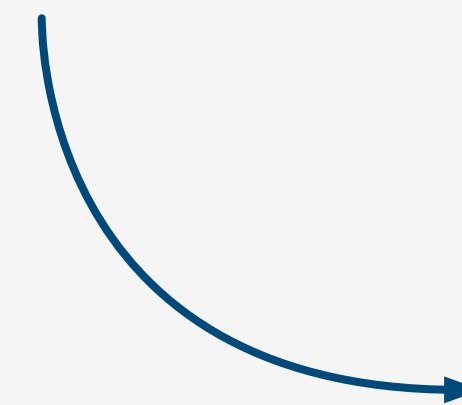
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William
Pharma sales rep



OCE+ predicts that physicians at this medical center prefer remote engagements after identifying a trend of decreasing HCP access.

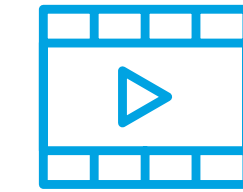


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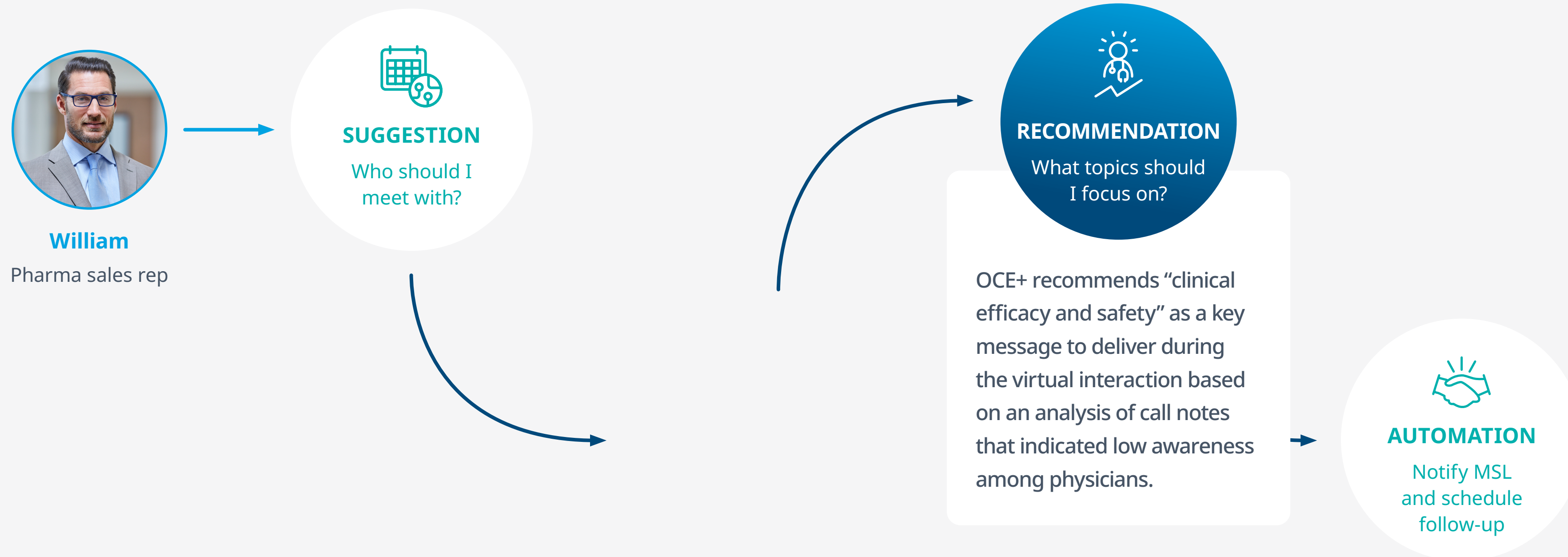
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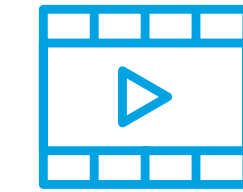
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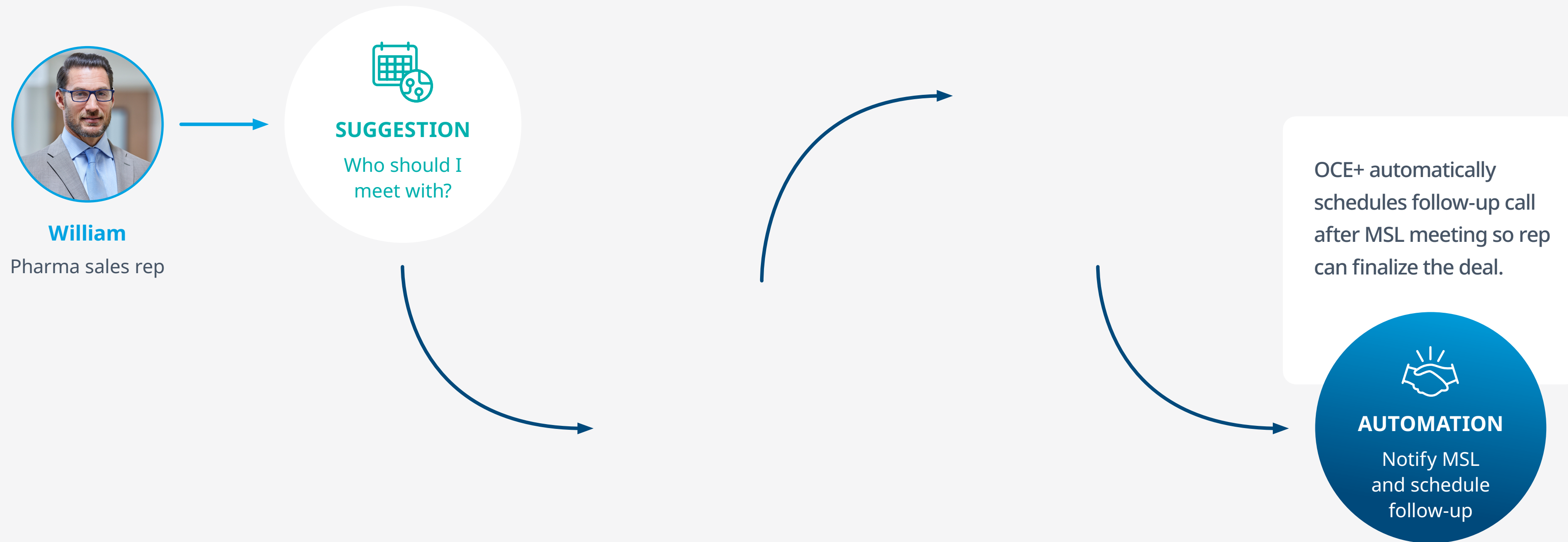
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Customer success story

Watch video



Customer success story

Watch video



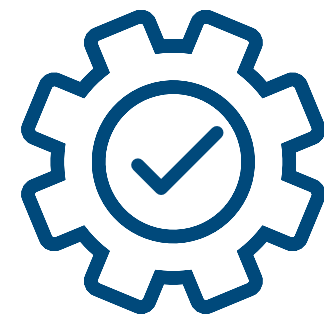
Situation

Following a successful pilot with a large ROI, this top ten pharma company wanted to deploy a global next best recommendation program. The scalable and self-service nature of AI/ML algorithms was a crucial factor for the selection of IQVIA Next Best to achieve their vision of expansion.



Solution

1. **Call pacing:** Suggest calls to high-value HCPs, and to deprioritize non-target HCPs.
2. **Event notification:** Implement follow-up calls with HCPs after they participate in events.
3. **Sales (Rx) outliers:** Identify high value HCPs to call in territories with declining sales trends, especially when behind call plan.
4. **CLM detailing:** Recommend one-to-one email follow-up with HCPs when they spend time on key messages in customer lifecycle management (CLM) click stream.



Results

Within 4 months, IQVIA Next Best had been deployed to over 4,300 sales reps. By the end of the program, it had supported:

1. The launch of 19 key markets
2. 106 brand teams
3. 350 sales teams
4. 6,000 sales reps with weekly data-driven suggestions

Recommendation adoption by sales reps was immediate, which increased sales performance by 35%. The client was also able to reduce costs by maintaining and evolving hundreds of algorithms in-house, without external support.



Conclusion

Fueled by Connected Intelligence™, OCE+ enables a smarter way to work. Leveraging IQVIA's unprecedented data, advanced analytics and extensive algorithm library, OCE+ generates the insights that matter to you, for you. When insights from these five AI/ML algorithms are embedded within OCE workflows, recommendations trigger action at the point of execution so that commercial teams can make smarter decisions with the click of a button, helping them to exceed expectations with more targeted and relevant engagement tactics.

To learn more about recent trends reshaping pharma, and the role of Next Best platforms in adapting to these changes successfully, read our [whitepaper](#). Alternatively, to discuss how OCE+ could optimize your HCP outreach strategy, please visit iqvia.com/oce-plus.

