

# Frequently Asked Questions About Omnichannel

A practical reference for commercial life sciences teams  
navigating the omnichannel landscape

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## Omnichannel is such a huge concept. What do you mean when you say omnichannel intelligence?

With a name that literally means “every channel” and its current buzzword status in commercial pharma, it’s no surprise that “omnichannel” has spawned hundreds of working definitions.

*Aktana’s definition: The ability to engage with your customers across all of the channels that you currently use using the same connected strategy.*

Whether your go-to-market strategy leverages 5 channels or 15, effective omnichannel engagement should feel like a continuous conversation that’s tailored to individual preferences and needs. We help our customers achieve this by using AI and machine learning to predict the ideal combination of channel, content and timing for each HCP interaction.



## Does omnichannel NBA include field NBA?

If the goal is **true omnichannel orchestration**, it must. While the field’s role may have evolved during the last year, it is still an integral channel in pharma’s commercial model—especially given the rise of the “hybrid rep,” whose domain includes both face-to-face and digital interactions. Successful omnichannel orchestration will require commercial teams to move away from siloed approaches where “digital NBA” and “field NBA” are considered separately.



## What’s the difference between long-term omnichannel optimization and “real-time” optimization, and which solutions are better suited for each?

It helps to think of optimization in two categories: long-term and real-time (and both are necessary).



### Long-term optimization:

*The optimization of channel and content investments based on what drives ultimate commercial results.*

For the most part, these fall under the umbrella of planning—think marketing mix analysis, HCP targeting and segmentation, and content development. Historically, this has been considered an analytical problem that’s ideally suited for consulting firms or internal analytic teams.



### Real-time optimization:

*The optimization and coordination of day-to-day channel activity to ensure a seamless and impactful customer experience.*

Humans alone can’t do this—especially at scale. This is primarily a technological problem best tackled by AI engines, which can rapidly consider recent activity, user feedback and value tradeoffs across products, channels and customers to optimize the customer experience at an individual level.

Connectivity between the two is critical for long-term engagement, which is only possible with machine learning due to the large volume of data and dynamic nature of commercial inputs.



## What is a realistic timetable for thinking about when my commercial operations can be truly omnichannel?

2020 definitely accelerated the life sciences industry's digital transformation efforts. At the same time, overhauling pharma's deep-rooted traditional commercial model to reach a place of "true omnichannel" won't happen overnight.

It takes time to develop key organizational capabilities, such as:

- ✓ Data maturity
- ✓ Change management
- ✓ A robust content library
- ✓ And more
- ✓ Tech stack integration

Setting up a data warehouse, for example, is often a two-year project by itself. It's important to remember, however, that an iterative approach to evolving your commercial operations is not only possible but also recommended.

Quick wins—like connecting your marketing automation system to an AI optimization engine that can immediately begin extracting HQ-level campaign insights to improve field engagements—steadily increase user confidence in new tools and new ways of working. As teams consistently see value from incremental wins, they're more likely to capture their own feedback, nurturing a virtuous cycle of data collection and refinement.

Organizations that rush through the transformation process often do so at the expense of robust technical quality and business alignment, only to find themselves spending far longer fixing issues and supporting lackluster adoption.



## How are NBA and CDP vendors different?



A Customer Data Platform (CDP) functions as a data warehouse for person-level data.



Next best action (NBA) platforms take the data you'd find in a CDP and translate it into action across all channels using contextual intelligence.

- CDPs track user engagement and unify an individual's various digital identities to produce a single, comprehensive profile of every customer.
- CDPs excel at **customer modeling** and **segmentation**.
- However, CDPs cannot yet handle the full complexity of life sciences data, which goes beyond person-level information to include facilities, accounts, bricks, sales territories, etc. If a piece of data is not available at the HCP level, it cannot be captured by a CDP.
- NBA platforms exhibit some, but not all, of the same insight aggregation capabilities as a CDP.
- NBA platforms excel at **translating insights into action**—navigating the critical last leg of the mile between strategy and commercial execution.
- After ingesting and processing data using a combination of AI, ML and business logic, NBA platforms connect to key marketing technology (like your CRM and marketing automation platforms) to integrate recommended actions directly into relevant workflows. How and where these recommendations are provided to the people in charge of implementing them is really where the rubber meets the road in terms of adoption, and why domain expertise is critical for NBA programs to be truly effective.



## Can AI and machine learning be effective if my data isn't perfectly centralized and structured?

In order for AI and machine learning to be effective, the majority of your data should be **accessible** and **consolidated**. But that doesn't mean you must have all of your data meticulously housed in one data warehouse before you can begin.

As long as your NBA system can connect to the most important systems in your commercial tech stack—like your CRM and marketing automation platform—you can start seeing value from AI. The natural consolidation and relatively high data availability from these two major platforms will create a solid foundation that you can build on as your organization continues to consolidate its data and systems.



## When a vendor tells me they can publish NBA to my CRM, how should I evaluate the quality and the truth of that statement?

Today, integrating with Salesforce—and therefore, being able to publish to most CRM platforms—is a basic capability for almost any piece of commercial technology. As a result, being able to push data into a CRM is only one of many boxes you should be able to check when evaluating an NBA partner.

In addition to asking about impact metrics, past implementations and most critically, seeing a demo, here are some helpful questions you can use to assess the quality of NBA recommendations:



### DOMAIN EXPERTISE

- Which actors do you support?  
In addition to sales and medical reps, can you support brand leads, commercial operations, district managers and analytics teams?
- Does your NBA system integrate bi-directionally with other technology partners like your marketing automation platform?
- How will users receive and interact with NBA recommendations? Are they delivered within the workflows they are already familiar with?



### TRANSPARENCY

- Do NBA recommendations come with simple explanations to help team members evaluate whether to follow them?
- Can you trace the genesis of each NBA recommendation—even those that aren't included in the final output to a user?



### RELEVANCE

- How frequently are NBA recommendations published or refreshed?
- How does the engine prioritize which suggestions are published in the end user's workflow?
- What optimization models are working to improve recommendations, both long-term and in real-time?



## My in-house analytics or data science team is working on an NBA or AI initiative as well. Is that redundant with what you do, or is there a “best-of-both-worlds” approach?

We’ve found that our most successful projects occur when we’re working in close partnership with these in-house teams because we’re each able to do what we do best. In-house teams can build analytical models that take advantage of unique data sources or address a particular promotional problem that’s specific to your brand, and continue to own the models and strategy.

Meanwhile, we can support these initiatives by providing a world-class optimization engine that addresses commercial pharma’s most frequently encountered challenges—like optimizing digital engagement, event follow-up and resource allocation. In the same way that you wouldn’t build your own CRM, there’s no reason to reinvent the analytics wheel for every scenario. Prioritize what demands custom attention from your team and leverage pressure-tested OOTB models for the rest to use your resources most efficiently.

We’ve honed our engine over 10+ years of working with top global biopharmas and are constantly producing new capabilities that you and your in-house analytic teams can benefit from. And with our open platform approach, you can plug any strategy, AI model or data source into our engine to produce more targeted and intelligent commercial programs.



## Why wouldn’t I want an NBA solution that’s custom-built for my team? Compared to a configurable platform, what are the advantages and disadvantages over time?

### PROS

- + Reflects your exact needs at the start of an engagement.
- + A lower initial investment, especially if the custom-built NBA solution is part of a larger analytics or consulting package.



### CONS

- When market dynamics and strategies inevitably shift, your technology partner will need to build out every change you’d like to make.
- The cost of ownership over time is typically greater since users cannot make their own adjustments, meaning it might make sense for your largest products and markets, but isn’t scalable across the organization.

### CONFIGURABLE PLATFORMS OFFER:

- ✓ A more flexible solution
- ✓ Faster deployment
- ✓ Reliable impact
- ✓ Ability to be right-sized to fit any market

By leveraging out-of-the-box AI models that can be combined intelligently for different customer journeys, you no longer have to build every model from scratch. And since you don’t need to be a data scientist to make minor strategy changes, you’re in control of your own agile response to the market.



## Are there any limitations to the data sources I can integrate?

As far as scale and complexity, there are **no limitations** to the data sources that you can integrate. Aktana's NBA engine can ingest both structured and unstructured data, and can even leverage Natural Language Processing (NLP) to bypass the need for exhaustive content tagging. That said, there are certain data sources, such as aggregated marketing program reports that can't be traced back to individual accounts, that won't be very useful for your NBA program.



## Is building my own solution the only way to ensure my IP is protected?

**No.** We've designed our platform to be open so that our customers can easily work with other models without relinquishing their IP. Our interface allows customers to push the outputs of their analytics to users without exposing any of the source code. And while the underlying platform technology is proprietary to Aktana, your unique configuration of the system will always be **your intellectual property**—including any use case libraries you create or unique analytical models ingested into the engine.

Ready to learn more about Aktana's approach to omnichannel intelligence?

Contact our team to get started.

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