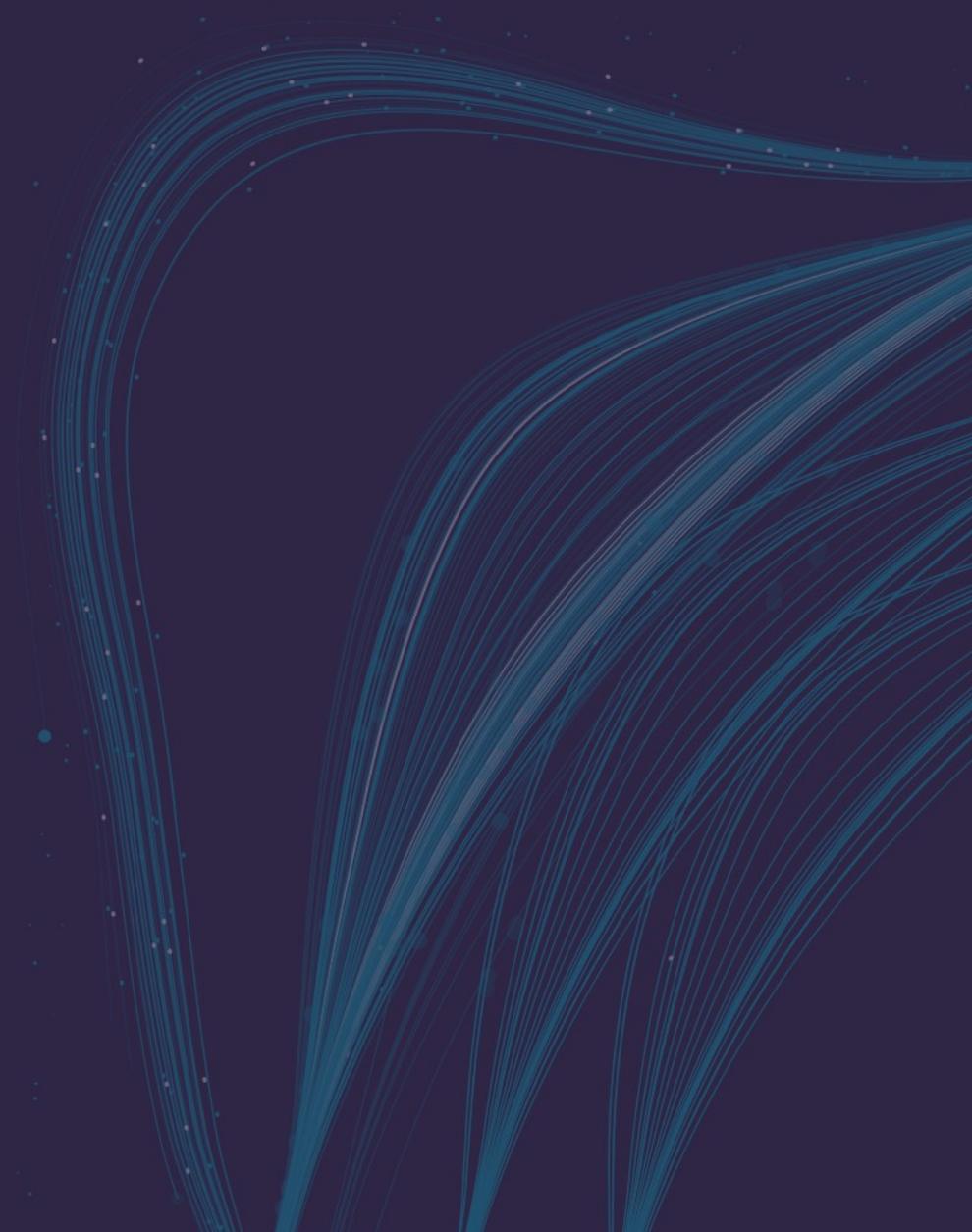


Case Study

Building Customer Advocacy: Medical Devices

Pe1atum



Building Customer Advocacy: Medical Devices

What is customer advocacy?

A National Sales team in a leading Medical Devices provider in Europe was seeking to compete in an ever changing and complex landscape.

Specifically, it's main customer - a National Health Service, was facing significant disruption from budget constraints, organizational restructuring and pricing, that presented challenges to the Sales Division.

Moving from Customer Loyalty to Customer Advocacy

The sales and marketing strategy wanted to move towards an end-state of customer advocacy, where clinicians and users of their products 'did the selling for them'. This sought to go beyond brand loyalty, and towards customers actively advocating for their products and services internally between colleagues and other key stakeholder groups - mainly clinicians.

Competing with Analytics

The sales team had to go beyond (established) sales relationships and 'cup of tea' interactions, towards an insight-driven way of working. To be able to deeply understand what the environment was looking for and provide their customers with the value before they asked for it!

The potential impact was huge:

- ❖ Repeat business
- ❖ Additional sales
- ❖ Premium pricing
- ❖ Customer referrals

Customer **satisfaction** level = Customer **loyalty** level

Customer **loyalty** level = Customer **profitability** level

The Challenge

The clearest barrier from the onset of the project was that the sales team was totally disconnected from analytics.

The clearest barrier from the onset of the project was that the sales team was totally disconnected from analytics. They had all been through Business Intelligence tool training, but the tool was primarily used for (financial) reporting. When I asked the UK Divisional Leader about formulating questions to analytics he said "he didn't even know where they would go or who to work with?".

As an experienced sales team, they were confident in analysing sales data, but very much through a backward looking, reporting orientation. Silos were abundant even with a closely supported marketing team whom had conducted some great market research, but then 'presented' in a report format at a quarterly offsite meeting that lacked the required buy-in and commitment to change. Secondly, the flows of insights from the 'front line - territory managers' were non-existent.

What we did

It became immediately clear from our initial analytics lab sessions with the leadership team, that in order to shift customers towards an advocate space, both sales, marketing and analytics had to work in harmony to increase their levels of understanding about the customer.

Only through this were we to be able to adapt and innovate around customer needs, exceed their expectations, and provide them with valuable insights in critical areas before they even asked for it.

This was a culture shift from taking key stakeholders (clinicians) out for an expensive dinner, towards building a data-driven mindset in leadership, so when sales reps were interacting with such customers in the hospitals, they could provide useful insights against key areas and then feedback observations and conversations to the analytics translator teams, that could then be fused into a wider more sophisticated intelligence picture; adding value to other interactions in other divisions in the organization.

They asked us to:

- ❖ Improve WoW with analytics teams and establish a translator capability.
- ❖ Disrupt their thinking and ask better questions to analytics to help them understand the customer landscape better.
- ❖ Break silos between regions and divisions.

Using data-driven insights to get closer to our customers

We approached the challenge by immediately staging cross-functional agile teams. Getting members of the field sales team, marketing and analytics together whom would have typically not been placed on a project together but knew each other and had a shared goal. Our aim during this phase was to stage alternative perspectives - key, in our experience, to surfacing the right questions to ask data.

We identified 10 key areas to explore using analytics during the project. Formulating high value questions against these areas where the analytics team could add value.

10 key areas to explore using analytics during the project

1. Helping customers achieve a better understanding of health economics, finding a balance between medical needs and budget constraints
2. Helping customers communicate better with patients, developing patient information and education
3. Improving the clinical team performance and motivation
4. Improving the procurement team performance and motivation
5. Better understanding of the legal environment of activity and managing legal risks
6. Understand project opportunities in green growth and sustainable development areas
7. Understand optimization levels of patient length of stay and patient flow
8. Understanding how digital technology can improve performance in our activity
9. Educating referring physicians on new therapies and improving the referral process
10. Getting expertise in the field of reimbursement, using best coding of products

This was just the start, and provided the wider team a clear focus on where to apply analytics and add value.

Through a series of on-going sprints, the analytics translators (tagged into the projects) were able to help leaders formulate targeted questions to analytics against these areas.

From trawler fishing to spear fishing with analytics!



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Our Mission

We are inspiring leaders towards a data culture. We are bringing people together to challenge their thinking and drive change. We are working with our clients to build the foundations that enable them to unlock value in analytics.

<https://pelatum.co>

**Want to understand how you can build a
data culture inside your organisation?**

Contact us: info@pelatum.co