



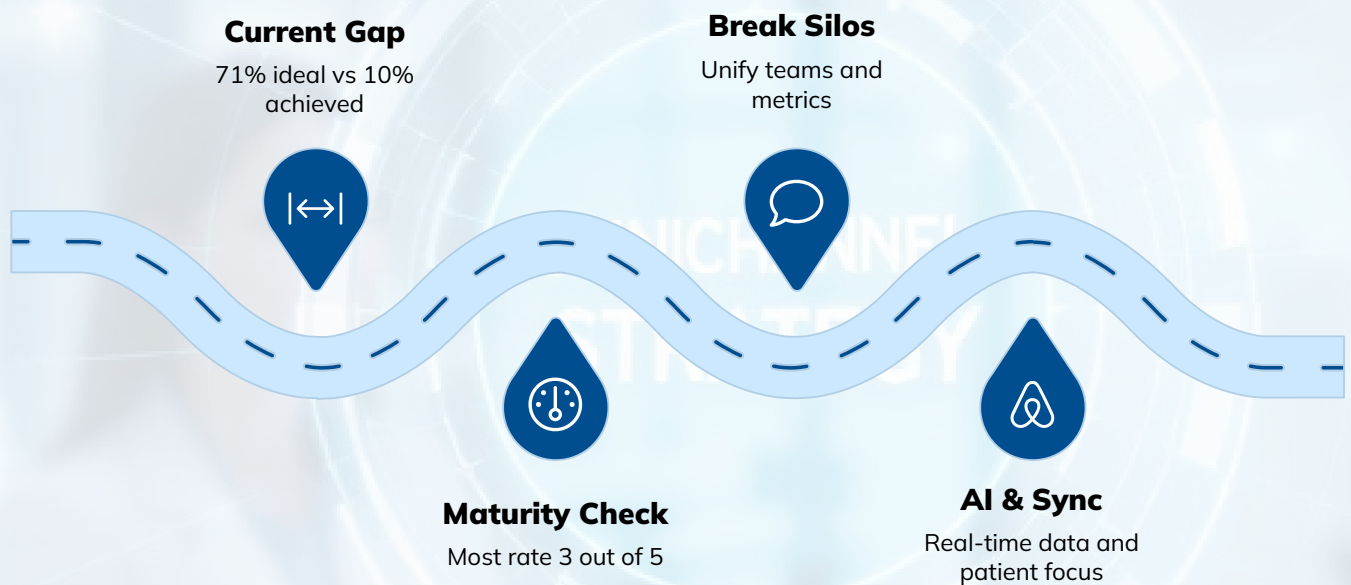
# **Omnichannel Innovation & Measurement in Pharmaceutical Marketing**



**A DHC Group Point of View**

# Executive Summary:

The pharmaceutical industry stands at a critical juncture in omnichannel marketing evolution. DHC Group's latest research, surveying 40+ pharmaceutical companies, reveals a striking disconnect: while 71% of companies define the ideal state as fully integrated HCP and DTC marketing aligned to the care journey, only 10% believe they've achieved this goal. Most organizations rate themselves at 3 out of 5 in omnichannel maturity. The path forward requires breaking down organizational silos, implementing unified metrics, and embracing patient-centric approaches powered by AI and real-time data synchronization. Companies that successfully coordinate HCP and DTC messaging in similar timeframes see measurable improvements in script lift and patient conversions.



## Featuring Expert Insights From:



**Andrew Burkus**

Senior Director, IQVIA  
Digital



**Kristen Vayda-Dreitlein**

Head of  
Omnichannel, Type 1  
Diabetes, Sanofi



**Bill Veltre**

EVP, Head of Media,  
Deerfield Group



**Theresa Greco**

CCO, OptimizeRx

# Introduction

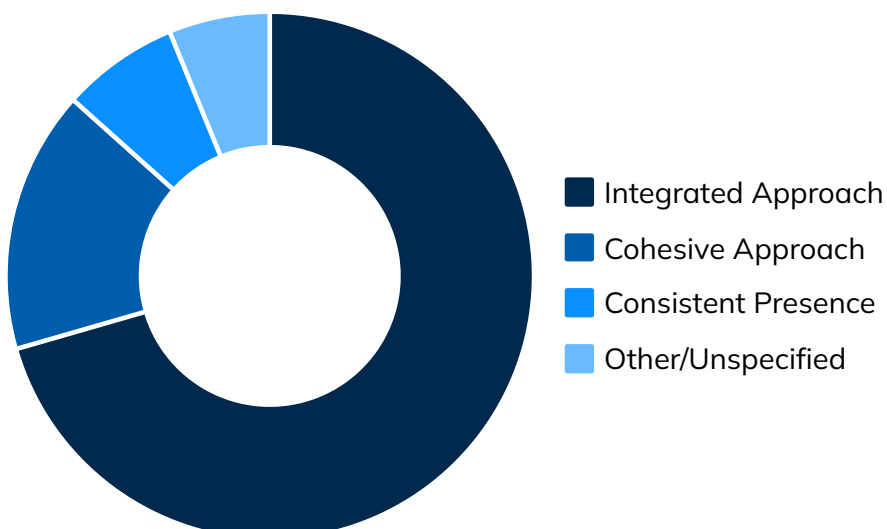
Omnichannel marketing in pharmaceuticals has evolved from a buzzword to a business imperative. Yet despite years of investment and innovation, the industry continues to struggle with fundamental execution challenges. This POV synthesizes insights from a DHC Group panel featuring leaders from OptimizeRx, Sanofi, Deerfield Group, and IQVIA Digital, combined with DHC Group's comprehensive survey data from across the pharmaceutical industry, to provide a clear roadmap for omnichannel transformation.

The promise of omnichannel was simple: break down the walls between channels to create seamless customer experiences that drive better outcomes. The reality, as Mark Bard's opening presentation illustrated, has proven far more complex, with organizational dynamics, technical limitations, and cultural resistance as remaining barriers to success.

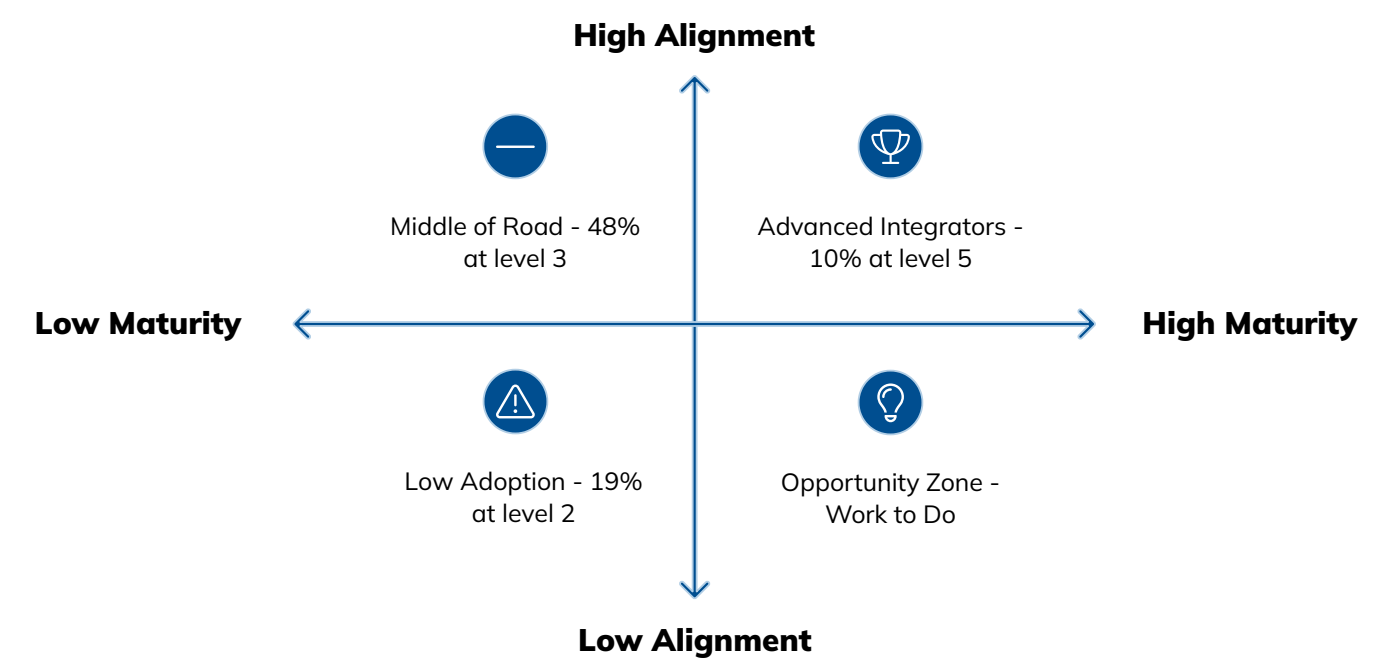
## The Current Reality: What the Data Reveals

Mark Bard opened the webinar with new data that set the stage for an honest industry conversation. DHCG's survey of 40 pharmaceutical companies revealed that while the industry has consensus on the destination, there's considerable confusion about the journey. When asked to define the ideal state of omnichannel marketing, an overwhelming 71% of respondents chose "an integrated approach to HCP and DTC marketing that focuses on aligning marketing audiences, channels, and messages to the care journey." Only 16% settled for the less ambitious "cohesive approach" focused on next-best-action strategies, and a mere 7% were satisfied with simply maintaining consistent presence across channels.

### How Marketers Views the Current Status of Pharma's Omnichannel Marketing Efforts



Yet when asked how closely their current practices measure up to this ideal state, the results painted a picture of an industry stuck in neutral. Nearly half (48%) rated themselves at 3 out of 5—squarely in the middle. Another 19% citing they were only at level 2, while just 10% claimed to have achieved level 5 integration. As Bard noted, "About half the industry saying, Yeah, we're about middle of the road. We still got a lot of work to do in some of these key categories."



This gap between aspiration and reality manifested across multiple dimensions. While 79% of companies rated themselves as focused (4 or 5 out of 5) on increasing cross-channel coordination and data sharing, and 71% claimed similar focus on synchronizing campaign timing between HCP and DTC audiences, the execution isn't necessarily matching the intention.



"What I think is very interesting, and this has come up in conversations Mark that we've had and I've had with other people throughout the industry: the promise of omnichannel versus where we sit today. There is fatigue and frustration which has turned people, in some instances, all the way, back to the old ways of marketing."

- Andrew Burkus, Senior Director, IQVIA Digital

Andrew Burkus from IQVIA Digital reflected on this disconnect. His observation suggests that the gap DHC Group's data revealed isn't just accurate—it's actively driving some organizations to remain in the status quo.

# The Metrics Evolution: From Counting to Impact

Bard's presentation revealed fascinating patterns in how the industry measures success. When metrics were categorized by audience, clear distinctions emerged. HCP-focused metrics dominated traditional measurement approaches: script lift, new-to-brand prescribers, audience quality, and new patient starts. DTC metrics centered on digital engagement: website traffic, ad clicks, customer lifetime value, and patient visits. The universal metrics—total prescription volumes, marketing ROI, and audience reach—served as the connecting tissue between these parallel tracks.

## HCP-Focused Metrics

- Script lift
- New-to-brand prescribers
- Audience quality
- New patient starts

## DTC-Focused Metrics

- Website traffic
- Ad clicks
- Customer lifetime value
- Patient visits

But the panel discussion revealed a growing dissatisfaction with these traditional approaches. As Theresa Grecco from OptimizeRx emphasized, **"At the end of the day, marketers and brands are making investments. We do expect results from those investments. Yet, I always look at things also through the lens of a measured and pragmatic view. The notion that a singular data point is going to be the thing that drives the outcome is silly."**

Kristen Vayda-Dreitlein from Sanofi pushed this critique even further: **"I still sit in rooms where we're patting ourselves on the back. We're talking about click through rates, and we're talking about high value actions in isolation, and so the fact that we're here all together now talking about omnichannel KPIs is progress, but success, in my opinion, tied to omnichannel is not really a one metric game."**

Bill Veltre from Deerfield Group connected these measurement challenges directly to business imperatives: **"On the brand side, at the end of the day, you are held to a forecast. This business model is consistent across our industry, and we are looking to deploy strategies that are ultimately going to provide brand impact. We have to make every dollar work like \$5 and show how we did it. There has to be proof in the pudding."**

This evolution in thinking about metrics reflects what DHCG's data categorized as "desired future state metrics"—advanced attribution through marketing mix modeling combined with multi-touch attribution, patient engagement indicators, and critically, operational outcome metrics that measure internal readiness and execution capability.

# The Three Pillars of Dysfunction: What's Really Holding Us Back



## Organizational Silos

Departments compete for control, blocking coordination

## Data Infrastructure

Disconnected systems prevent unified insights

## Cultural Resistance

Fear of change stalls adoption and innovation

## Organizational Silos: The Uncomfortable Truth

While DHCG's data showed that 54% of respondents rated themselves as "completely focused" on increasing cross-channel coordination, the panel discussion revealed why this focus wasn't translating into results. Kristen Vayda-Dreitlein delivered perhaps the most brutally honest assessment of the entire webinar: **"What I don't think we're really saying loudly enough is that everyone wants omnichannel. Yeah, but no one wants to give up the control to get there. That's the truth. I'll call myself the resident Bad Girl of Pharma. I'm the first one to always say I'm a natural, self proclaimed land grabber."**

She elaborated on this dynamic with striking clarity: **"Brand wants to own the message, great, and then the field wants to own the relationship, and the data team wants to own the insight, and legal wants to own or doesn't want to own risk, right? So we instead, I think someone else said it earlier, layer, instead of integrate."**

This observation perfectly explained why, despite the high percentages of companies claiming to focus on coordination in DHCG's survey, actual progress remained limited. The structural and political barriers within organizations were proving more powerful than strategic intent.

## Data Infrastructure: The Technical Reality Check

Bard's presentation highlighted interesting nuances in how companies view their data sources. Internal system reports were generally considered most trustworthy, followed by third-party sources (useful but requiring interpretation), marketing agency reports (trusted but potentially biased), and specialty vendor reports from EHR and telehealth platforms (valuable but variable in reliability).



Andrew Burkus provided crucial context for why this matters: "If we really want to deliver on that early promise of omnichannel, we might need to course correct and take a half a step back: data structure, data strategy, data governance, frankly, the stamp of approval of internal privacy for what you're doing, how you're gathering, how you're using that data. Those are things we should all be thinking about right now, because things are changing so quickly, and if you aren't standing on solid ground today, and then you're just building more upon it, it's sort of a house of cards."

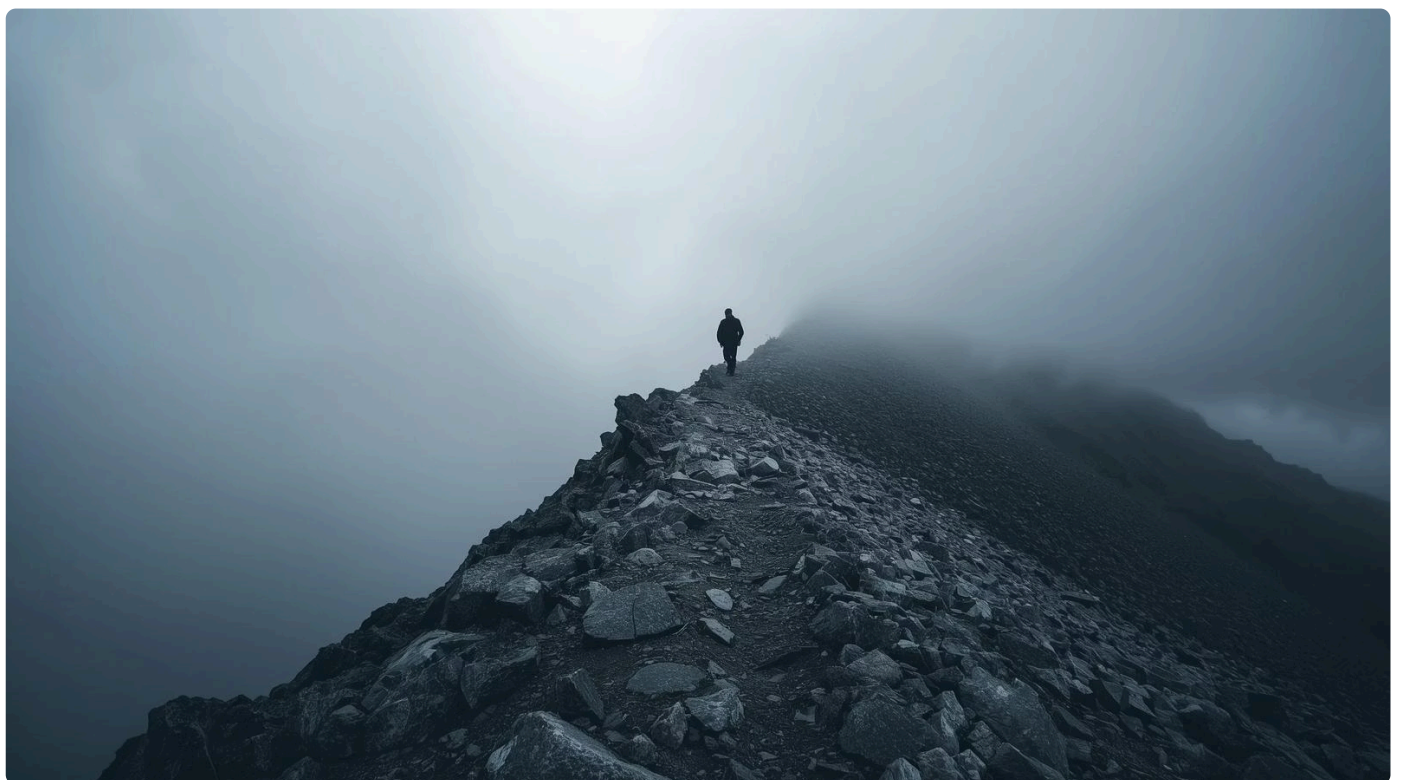
He warned about the consequences of ignoring these foundations: "It's going to collapse, and then everybody's going to walk away, and all these omnichannel pilots are going to be considered a failure, or those that were successful maybe won't be given the blessing to scale, because they took too long in terms of recognizing the perceived benefits."

## Cultural Resistance: Fear as the Silent Killer

Bill Veltre identified an emotional undercurrent that the quantitative data couldn't fully capture: "It's funny to hear them talk about it, because I think you're bringing to life what we all are suffering from, which is we've overcomplicated omnichannel and now there's fear, right? We have a fear of failure, fear of not being able to act fast enough, fear of not meeting the forecast."

Theresa Grecco added another dimension to this cultural challenge: "Let's not underestimate the value and the impact of cultural alignment within the organizations which we operate. So we have P&L owners that may have distinct goals from other facets...That cultural shift can be one of the almost silent killers of successful channel growth and integration."

She also highlighted how leadership inconsistency compounds these problems: "Having Whack a Mole strategies creates more dysfunction within the organization, so it takes longer to drive meaningful impact. And then when you look in the rear view mirror and say, 'Did we really get what we were trying to get?' We're not sure, because we changed course midway'."



# Breakthrough Strategies: Learning from the Leaders

Despite the challenges revealed in both The DHC Group's data and the panel discussion, success stories emerged that offered hope and direction.



## Synchronized Messaging

Coordinating HCP and DTC messaging based on patient care journey leads to more conversions and script lift



## Patient-Centricity

Using patient journey as the central organizing principle for marketing strategy and measurement



## Technology + Human Intelligence

Leveraging AI while maintaining human oversight for emotional intelligence and strategic guidance

## The Power of Synchronized Messaging

While Bard's survey showed that 71% of companies were focused on synchronizing campaign timing between HCP and DTC audiences, the panel revealed what this actually looks like in practice. Theresa Grecco explained the impact: **"When brands can educate a patient and their HCP at the same time, in a synchronized way, based on where that patient is in their care journey,...we see more conversions and more script lift. That's the power of messaging both the HCP and DTC together."**

Andrew Burkus took this concept even further, suggesting we need to think about how consumer investment affects physician behavior: **"How does our DTC investment, if we're sending educated patients in to have those conversations, isnt that also part of the HCP omnichannel mix? Because that is influencing a conversation, and that conversation is the basis of how the therapeutic decision is going to be made."**

## Patient-Centricity as Operating Principle

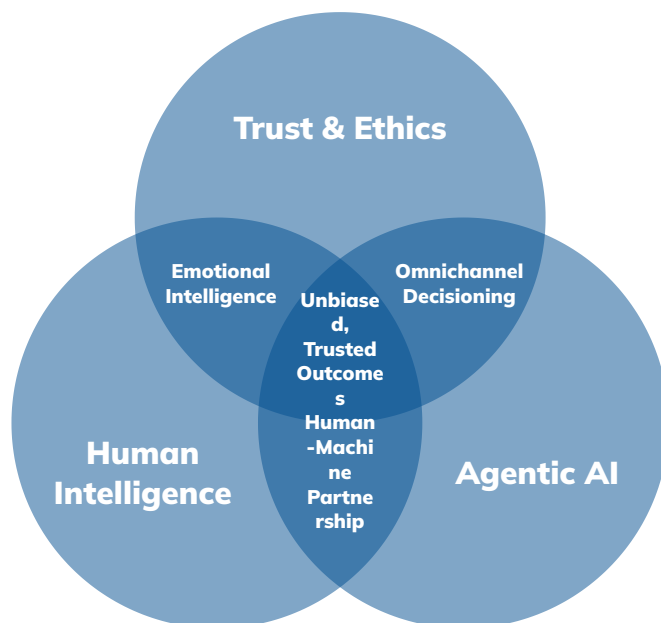
Kristen Vayda-Dreitlein shared concrete examples of how it's possible to put patients at the center: **"I've been able to work on developing fictitious personas as well when we see content gaps. I'm also trying to break down barriers by bringing cross functional team members into what we would call war room style live coverage where I'm posting in 'real time'. I'm at ADA, or I'm at a congress or I'm at the patient event and getting everybody together to support real time content."**

Her passionate advocacy for patient-centricity culminated in a powerful statement: **"We need to stop treating the patient journey as a nice to have, and start measuring against it. And I think that, to me, is where the real innovation will live."**



# Technology as Enabler, Human Intelligence as Guide

Bill Veltre offered a balanced perspective on the role of emerging technology: "I think the clients that we work with, from an agency perspective looking at unbiased technology and unbiased partnerships, being able to sit at the table and really invigorate trust...I think that's going to happen through agentic AI modeling, right, and being able to use agentic, omnichannel decision-making tools that ultimately are going to help drive that but be underpinned by human intelligence."



Andrew Burkus reinforced this human-machine partnership: "That blend of our EQ and experience with what the machines can help us accelerate from a learning standpoint-there's a lot of interesting stuff that's being piloted now...but I do think it's important to remember too our role as individuals, our role as brand marketers, providing that emotional intelligence, that human intelligence, and applying this with what that next best action is being told by the machine."

## The Road Ahead: From Data to Action

The contrast between DHCG's survey data and the panel's lived experiences revealed both the challenge and the opportunity ahead. When asked about future innovations, the panelists' responses aligned remarkably with the gaps the data had identified.



"Looking ahead, what excites me the most is really connection at scale. I think all of my fellow panel mates have touched on this. Everyone's demoing AI, but I really want to see who can operationalize it..."

- Kristen Vayda-Dreitlein, Head of Omnichannel, Type 1 Diabetes, Sanofi

Theresa Grecco expressed excitement about the convergence of data and technology: "The power of computing technology that's available now helps us gmaidentify patterns and opportunities that may have been – or may still be – unseen by the human eye or require significant modeling. I think that that is here to stay. AI powered segmentation and predictive modeling is really helping to identify high value targets earlier, especially for complex, under-diagnosed or misdiagnosed, and those needle in the haystack patients."

Bill Veltre focused on the trust-building potential of AI: "I'm really very interested in agentic AI and how it's going to transform decision-making in our industry to improve outcomes...utilizing your agency partner as that trusted partner and expert that can sit at the table with you, and ultimately help you unravel what the AI is telling you, and pressure test and really make sure, before you go into market, that you're utilizing the best strategies possible."

Kristen Vayda-Dreitlein brought it back to fundamentals with her vision of "connection at scale": "Looking ahead, what excites me the most is really connection at scale. I think all of my fellow panel mates have touched on this. Everyone's demoing AI, but I really want to see who can operationalize it, modular content, signal based triggers all the journey mapping. It sounds great, but the real work is about, again, connecting the dots, the patient behaviors, to the prescribing trends, and then using qualitative insights to really funnel it."



## Conclusion: Bridging the Gap Between Aspiration and Reality

Mark Bard's data painted a clear picture: the pharmaceutical industry knows where it wants to go with omnichannel marketing but is struggling to get there. Only 9.52% of companies believe they've achieved their ideal state, while nearly 67% rate themselves as average or below. Yet the focus is there—79.17% are prioritizing cross-channel coordination, 71.43% are working on campaign synchronization. So why the disconnect?

The panel discussion provided the answer: it's not about strategy, technology, or even metrics. It's about organizational courage. As Bill Veltre observed, the industry has "**overcomplicated omnichannel and now there's fear.**" Kristen Vayda-Dreitlein cut to the heart of it: **everyone wants the benefits of omnichannel, but "no one wants to give up the control to get there."**



The path forward requires pharmaceutical companies to confront uncomfortable truths about their organizational structures, cultural dynamics, and operational capabilities. It means accepting what Theresa Grecco called the non-linear nature of marketing—that no "singular data point is going to be the thing that drives the outcome." It means building what Andrew Burkus described as the foundation for "that analytics ready, unified data set" even if that requires taking "a half a step back" before moving forward.



### Confront Organizational Truths

Address uncomfortable realities about structures, cultural dynamics, and operational capabilities that prevent true integration.



### Embrace Non-Linear Marketing

Accept that no "singular data point is going to be the thing that drives the outcome" and build more sophisticated measurement frameworks.



### Build Strong Foundations

Create "analytics ready, unified data sets" even if that requires taking "a half a step back" before moving forward.

Most importantly, it means remembering why omnichannel matters. As Bill Veltre reminded us, **"Behind every script is a patient, and we want to obviously get that to them as quickly as possible in order to provide that life changing solution."** When pharmaceutical companies successfully orchestrate omnichannel experiences, they're not just improving marketing metrics—they're enabling better healthcare outcomes.

The gap that Mark Bard's data revealed between current state (3 out of 5) and ideal state (5 out of 5) isn't just a measurement challenge—it's an opportunity. The companies that can bridge this gap—that can transform their organizations from channel-centric to patient-centric, from siloed to integrated, from fearful to courageous—will define the next era of pharmaceutical marketing.

As we look to the future, the message from both the data and the discussion is clear: incremental change won't be enough. The industry needs transformation, not evolution. And as Kristen Vayda-Dreitlein's passionate closing reminded us, **"This is not just good marketing, it's better care, it's better outcomes. We need to stop treating the patient journey as a nice to have, start measuring against it...we as an industry have that responsibility to get there."**

The time for transformation is now. The question isn't whether to pursue it, but whether your organization has the courage to see it through.

# About DHC Group

The DHC Group is known for cutting edge research, expert strategy, and analytics-driven insights.

Building on the leadership team's combined 50+ years of industry experience working with innovative companies, brands, and a wide range of pharmaceutical, biotech, and medical device companies, the DHC Group provides industry thought leaders and innovative organizations a selective opportunity to define the future of digital health and pharmaceutical marketing.

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