

Pharma Marketing: Get Started on Creating Great Customer Experiences with Journey Strategies

By Connie Moore

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Executive Summary

A well-defined customer journey strategy is critical to customer experience management (CEM) initiatives.¹ Yet most pharmaceutical companies have not followed the lead of industries like consumer packaged goods, retail, or travel and hospitality, which pioneered and mastered the art and science of personalized, cross-channel customer journeys. While recognizing that customer journeys are often more complex for pharma than for other sectors, it's imperative for life sciences to develop and apply journey strategies similar to those of other industries when transforming customer experiences.

But first, what is a customer journey strategy? Digital Clarity Group (DCG) defines it as follows:

The enterprise's business technology plan to engage and delight customers by supporting all touchpoints that span discovery, sales, finance, support, and service, and by integrating the multiple devices, interaction channels, and application silos that support those customer touchpoints.

Customer journeys are highly strategic and – in a competitive and regulated environment like life sciences – understanding them can literally make or break the success of a new drug launch, as well as efforts to achieve long-term loyalty and adherence. For pharma, added complexities start with the definition of the “customer.” While patients are the end consumers, pharma has more direct relationships with prescribing health care providers (HCPs), who significantly influence the patient experience and most certainly determine the successful marketing of medications.

Pharma continues to spend the lion's share of its marketing dollars to reach patients via broadcast advertising and print. Direct-to-consumer pharma ad spending soared more than 60 percent in the last four years, hitting \$5.2 billion last year.² Marketing's goal for these ads is to acquire and influence patients who have assumed unprecedented control of their treatment decisions – yet the ROI of such investments remains questionable. Pharma companies must put aside the status quo and acknowledge that fundamental shifts in patient behavior are directly impacting traditional marketing tactics.

Over the next two years, the life sciences industry will undergo dramatic, transformative changes in how pharma companies interact with patients, HCPs, pharmacies, and insurers. These changes will directly impact revenues and costs for both pharma and intermediaries, and reshape the customer experience. Disruptive changes will be fueled by new technology advances, such as virtual, wearables, and the internet of things, plus shifting customer expectations and disintermediation. Instead of continuing to focus almost exclusively on advertising, pharmaceutical companies must move quickly to develop more expansive and comprehensive customer engagement strategies, and begin adopting direct-to-consumer tactics similar to consumer packaged goods companies.³ These include streamlining the customer journey, improving

customer experiences, owning more customer data, and building closer relationships with consumers over time. To capitalize on new opportunities, marketers must rethink their direct-to-consumer strategy in light of evolving patient needs and expectations, expanding digital channels, and an ever-changing regulatory climate.

Likewise, pharma must adapt its B2B strategy in light of diminishing direct access to time-strapped HCPs. With less than half of all HCPs willing to meet with pharma sales reps, it's imperative for pharma marketers – as well as field sales – to leverage mature B2B marketing tactics to educate and engage them. Examples of such tactics include one-to-one personalization on the channels that these professionals prefer, increased use of mobile technologies, and virtual meeting solutions. As with pharma patients, the goal of the HCP journey strategy is to understand precisely where they are in their journeys and guide them towards an appropriate conversion point based on available data and preferred communications channels. This requires orchestration between marketing, sales, and potentially operations to create an HCP engagement model that captures every interaction and delivers relevant content.

Moments of truth – such as when a prospective patient indicates affinity by clicking on a social ad promoting a new medication, or when an HCP clicks through an email about a new trial – provide crucial intelligence for refining customer experiences. These moments are essential building blocks of a customer journey strategy, and they continue to evolve as new channels emerge and HCP and consumer behavior change. As a result, no customer journey strategy is ever complete – it is a continuous process of deploying, learning, measuring, and adjusting.

Pharma companies that embark on journey strategies and develop journey maps that graphically depict the pluses and minuses of current interactions, and then interpret customer journeys within the context of future industry disruption, are well positioned to win the ongoing race to acquire, onboard, engage, and retain patients and HCPs. The message to the C-suite? Make sure your organization has a journey strategy that includes all customers, supports crucial moments of truth, anticipates future industry changes in a dynamic marketplace, and, ultimately, spans all touchpoints.

A journey strategy is the enterprise's business technology plan to engage and delight customers by supporting all touchpoints that span discovery, sales, finance, support, and service, and by integrating the multiple devices, interaction channels, and application silos that support those customer touchpoints.

Focus Journey Strategies on Speed, High-Value Interactions, and Analytics

Organizations that successfully adopt customer journeys as part of their overall business strategy often succeed in growing customer accounts, increasing revenues, and improving business results. By focusing on the customer journey, companies can make simple adjustments that have big payoffs. For example, matching an HCP's response to an email campaign with his prescribing behavior and preferences lets the organization learn which channels the customer prefers and target those channels in future interactions.

Successes and tactics like these have catapulted the delivery of a great customer experience into the boardroom, where the C-suite routinely discusses topics such as customer journey strategies and incorporates them into the organization's strategic focus. As a result, three critical customer journey trends have emerged in organizations over the last 12 months:

1. Using high-performance journey teams to quickly develop a holistic journey strategy that grows the business. Organizations with successful journey strategies also have high-performance marketing teams capable of adopting journey strategies, integrating them with the overall business strategy, and doing so quickly (in light of intense competition). As *Harvard Business Review* points out, companies are now creating journey product managers as "the journey's economic and creative stewards. They have ultimate

accountability for its business performance, managing it as they would any product."⁴

Trying to create a holistic journey strategy without these resources is time-consuming and doesn't leverage internal assets effectively.

2. Integrating customer journey platforms with analytics and predictive intelligence.

Organizations use analytics extensively with journey platforms for many reasons, including measuring attribution across channels, identifying costly bottlenecks that don't provide value to customers, surfacing high-value orders that might otherwise have been missed, and determining media impact across channels. By using analytics data, organizations can identify the best media for promoting products, streamline the journey while adding value for the customer, identify areas potentially at risk for fraud, and make real-time decisions throughout the customer's journey.

3. Using omnichannel and back-end integration to support a single view of the customer across channels.

Companies are increasingly integrating back-end business systems for internal uses, and then incorporating customer touchpoints. This provides a single view of the customer across all channels (including social media, email, and other marketing campaigns), all working off an integrated source of information. These in turn support integrated marketing

strategies, which are centrally coordinated across all channels, products, and services of the organization. Although it is still early and this type of integration is both expensive and challenging (requiring a service-oriented architecture), organizations are increasingly focused on realignment and moving across organizational, application, and information silos. Also, advanced thinkers who focus on operational excellence for internal processes are beginning to work with journey teams to investigate integrating journey strategies with transformed business processes and how to marry journey mapping with process mapping.

Journey Mapping Is an Important Tool for Visualizing and Communicating the Customer Journey Strategy

Organizations use journey-mapping methods and software to visually depict customer touchpoints, providing a useful tool in developing the customer journey strategy. A customer journey map is a diagram showing the stages of customer engagement with an organization across the channels associated with every service or product. Many visualization tools can display customer experience dimensions including sentiment, touchpoints, goals, experiences, and successes.

When mapping the customer journey, teams must remember that the only way to develop an accurate picture is to base it on accurate data. Importantly, companies must consider two perspectives while developing the journey map: the customer's perspective on the organization, and the organization's perspective on the customer. Using both perspectives, project teams should work to achieve these goals:

- **Identify obstacles as well as great experiences.** When identifying the experiences across all touchpoints from the customer's perspective, it's important not only to replicate great interactions but also to understand obstacles customers encounter that result in poor interactions. A seemingly small obstacle such as a poorly designed website landing page could result in significant revenue losses.
- **Understand how customer experiences align with organizational structures, channels, and metrics.** If an internal 48-hour turnaround service metric has been agreed but the customer expects same-business-day service, then the journey map should show the misalignment.
- **Go beyond customer interactions to include all systems, processes, and support staff involved in customer interactions.** Realistically, enterprises will need several journey maps to encompass the different

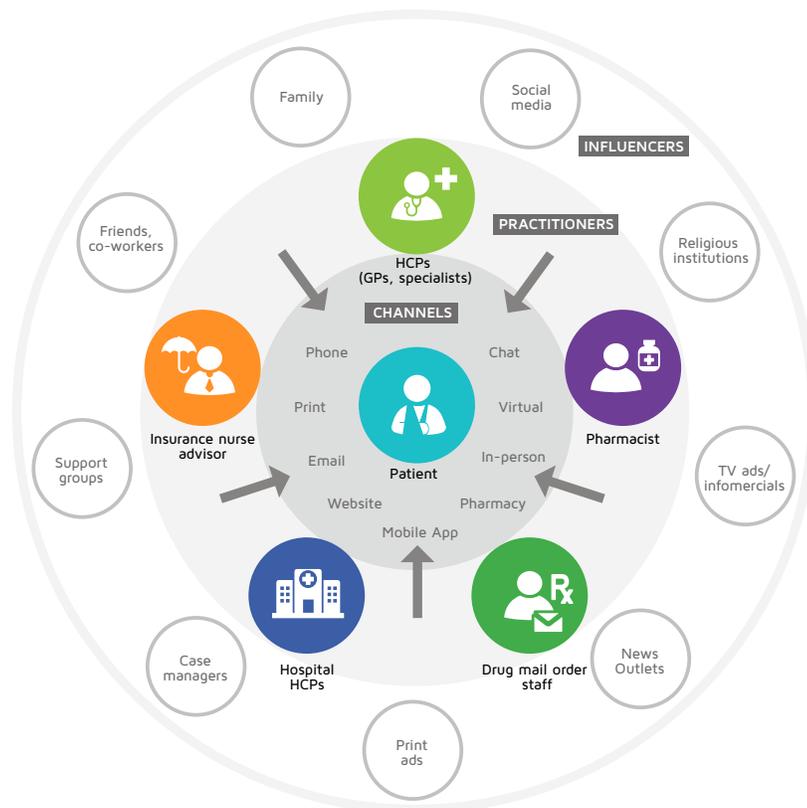
Mapping all the customer interactions from cradle to grave might be possible and useful but it is a mistake to then try to fix (or even pay attention to) every one of them.

scenarios and paths that customers may take to engage with the organization. A single map will seldom convey the whole picture. The pharma patient lives and works in a diverse ecosystem that incorporates many medically related practitioners and a range of influencers (both human and digital/analog) – all of whom may reach the patient using a broad array of channels. (See Figure 1.)

Organizations must also realize that customer journey maps can depict scenarios ranging from a simple series of customer interactions to buy a product, to more complex, comprehensive diagrams of the entire customer journey across the customer’s lifetime – spanning all parts of the organization that serve the customer. Project teams must take two important precautions:

- **Don’t try to fix every single customer interaction.** Pharma companies must differentiate between the complete customer lifecycle and a relatively small number of high-value customer journeys. Developing the journey strategy is paramount for identifying a limited number of journeys that highly influence both customer satisfaction and value (revenue) for the organization.
- **Align customer experience teams’ efforts with the journey strategy so they won’t become overwhelmed or go off-course.** If the customer journey strategy has a wide scope, then journey maps should be broken down into specific products/services, specific channels, and specific parts of the organization or implementation phases.⁵

Figure 1
Influencers, Practitioners, and Channels



Developing a journey strategy will allow organizations to map out all of the interactions in the customer journey lifecycle and identify a limited number of journeys that highly influence both customer satisfaction and value (revenue) for the organization.

Figure 2
Sample Journey Map Depicting the Fibromyalgia Patient’s Customer Journey

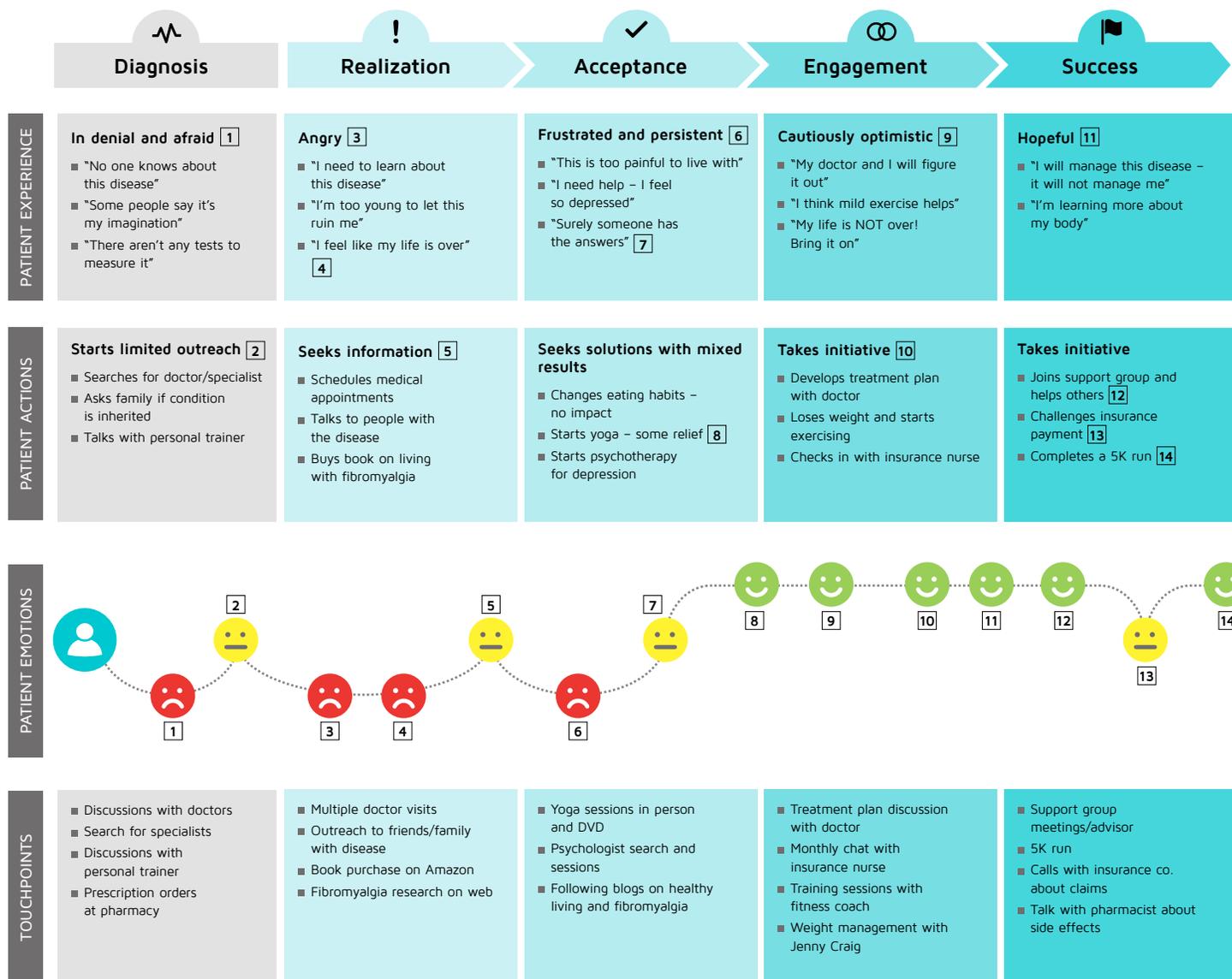


Figure 2 provides a simple example of a fibromyalgia patient’s journey map that identifies the stages in diagnosing and treating the disease, including the steps, channels, patient interactions, and customer thoughts and emotions. From this, the project team can identify ways for the pharma

company to improve the journey. Customer journey maps for complex processes that span multiple channels – both digital and analog – are more detailed than this map, which is shown for illustration purposes.

Be Prepared: CMOs Will Encounter Challenges with Journey Strategies

Journey strategies provide significant value to organizations that are focused on delivering exceptional customer experiences, bringing journey mapping to the forefront as an important tool in the CEM program. However, pharma CMOs will encounter several challenges as their organizations move to develop their journey strategies and build out their maps:

- **Customers want to control how an organization engages with them.** As a result, marketers need to shift their approach from campaigns that typically run over fixed time periods and fixed channels to more flexible solutions that can operate in customer time in the channel where the consumer finds herself. The cross-channel benefits that can be achieved – by combining mobile location-based campaigns with e-mail campaigns, for example – far outweigh the benefits of single-channel, fixed-time campaigns.⁶ Applying a journey-mapping approach will help to identify the cross-channel touchpoints.
- **Marketing campaign effectiveness can be very poor if it is ad hoc and not based on customer-provided data.** In the rush to do something quickly, and given the heavy emphasis on big data, CMOs may lose sight of the relevant consumer intelligence already at their disposal. Sometimes, collecting more data is not necessarily better; sometimes, using what you've already got is expeditious, cost-effective, and very helpful. Unfortunately, companies often ignore small

data opportunities in an attempt to focus on big bang, big data implementations. Successful CMOs start with the right data, which in many cases they already own, before trying to collect big data. They focus on accurate marketing analytics supported by predictive intelligence to get answers to the problems they seek to solve.

- **With the C-suite focus on CEM, it's easy to fixate on digital and lose the big picture.** Implicitly, “digital” refers to sweeping changes brought about by digital computing and telecommunications after the 1960s – specifically, megatrends like the rampant growth of the web, cloud, mobile, social, e-commerce, and now, cognitive computing. Today, digital has become business as usual for marketing. To significantly impact the customer experience, digital must be viewed as an integrated, holistic strategy and not as completely separate from the rest of marketing. CMOs must reduce the number of digital silos and build a shared journey strategy with digital an integral part of the overall customer experience.

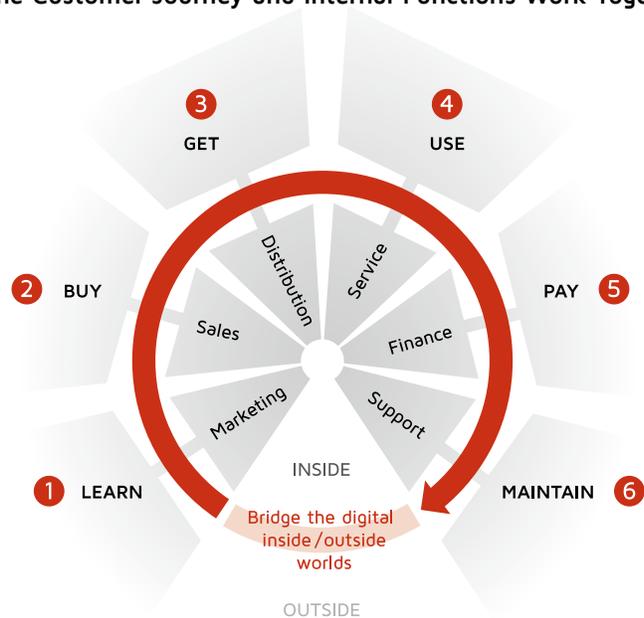
Journey Strategies Create Challenges by Attempting to Span Business Silos

Organizations must serve customers and prospects across all channels and virtually any device, creating personalized omnichannel experiences across all business units. This requires a mature journey strategy, a high degree of knowledge and experience, and a serious amount of fortitude. Given the many available touchpoints, or points of interaction (POIs), customer journeys are no longer linear. A consumer can research a new over-the-counter drug using Google and social media, listen to podcasts by patients with similar issues, pose a quick question to the insurance company's nurse liaison via chat, and buy the drug online almost in parallel. No matter how much organizations want consumers to follow the journey laid out for them, interactions are no longer black and white, sequential, or as tidy as traditional funnels. Realistically, life sciences must embrace the complicated, cyclical, and often quirky nature of a consumer's interactions with their products.

Marketing leads most customer experience initiatives (although customer experience executives and other newly titled individuals are also making headway), yet many of the interactions a customer has with an organization's products and services are beyond the CMO's control.⁷ Typically, marketing must convince various functional silos (e.g., sales, support, finance) within the pharma company to work together and buy into the journey strategy. Fortunately, the journey-mapping process could reduce duplication in multiple customer experience projects.

Figure 3 punctuates the importance of aligning external customer touchpoints (outside-in) with internal processes that support customer interactions (inside-out).⁸ Without the support of functional leaders, such as the VP of sales or

Figure 3
How the Customer Journey and Internal Functions Work Together



VP of support, it is hard for the CMO or other customer experience leader to truly implement a customer journey strategy. By collaborating with other departments to create cross-functional processes that support customer POIs, marketing can identify opportunities to integrate customer data throughout the organization (i.e., information that is outside marketing's purview) to get a better view of what drives customer behavior during the buying or support journey.

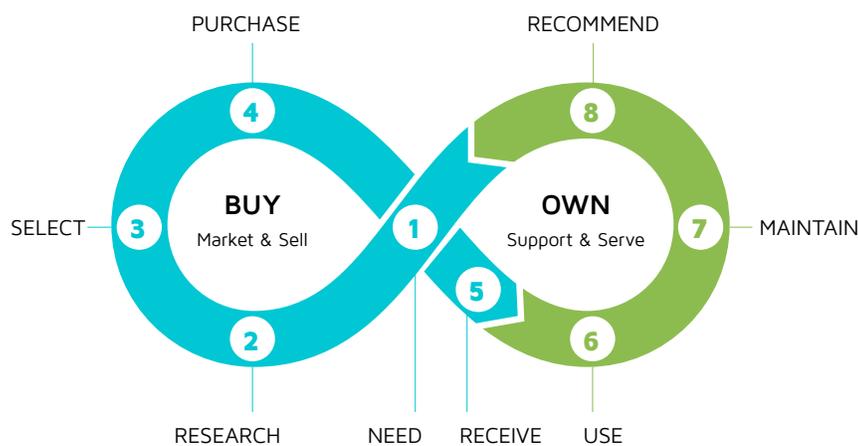
Whenever possible, the CMO should collaborate with other functional executives to identify internal processes that align directly with customer interactions, and seek to implement cross-functional, customer-centric processes that integrate departmental silos into a holistic customer journey. This is a tall order and well beyond the reach of any CMO without extensive collaboration and leadership across the C-suite.

Start by Following Best Practices

Attempting to focus on every single customer POI is an impossible and fruitless task; instead, journey teams should concentrate their efforts on identifying the highest-value touchpoints and making sure these interactions provide great customer experiences across the journey. Below are key best practices to observe when starting to build a customer journey strategy and a supporting journey-mapping practice:

- **Know where the customer is in the journey.** With the customer in control, it's vital that the organization listen to what he is saying about wants, needs, expectations, and preferences. Listen for those cues, and understand where every customer is in his journey with your organization. Focus on moments of truth that matter for customers when they engage with your organization during their journey, and make it easy for each consumer to move to the most relevant journey.
- **Consolidate your customer data to better understand who and what customers seek.** Specifically, use your data about where the consumer is in her engagement with your organization to map her actions to your internal processes and services. (See Figure 4.) If the customer is at the research stage (#2 in Figure 4), offer products that move her to the select and purchase stages (#3 and #4), where she will make a decision and then buy. These lifecycle stages can be further broken down through journey mapping to document the enterprise's processes for engaging with customers.

Figure 4
Customer Lifecycle Management



- **Deliver consistent experiences irrespective of the channel.** Building the complete customer journey while using organizational, application, and information silos is fraught with risk. That's because each functional group supporting the POIs in the journey may have developed very different ways to support customers. User interfaces may vary widely, making the customer's journey between touchpoints a jarring experience. Or, customer-provided data may not be persistent across touchpoints, requiring the customer to repeatedly provide the same information to a service representative or on the website.

Unfortunately, companies often ignore small data opportunities in an attempt to focus on big data implementations.

- **Include all channels and every area of the business with the highest value for customers.** This means utilizing everything at your disposal, including emails, SMS messages, push notifications, digital and traditional ads, web experience, in-store, sales reps, traditional and mobile apps – as well as emerging channels like wearables, virtual, and the internet of things – to reach consumers on all digital channels. Then build interactions that extend beyond marketing to every area of the business that aligns with the customer experience.
- **Don't overanalyze when implementing the journey.** Once all the planning has been done and it's time to implement, don't overanalyze. For example, don't waste time creating beautiful diagrams or spend endless hours trying to create the perfect journey. Developing a journey strategy requires an evolutionary, phased approach, best done by automating processes and interactions to move at the customer's speed. Use an automation tool to engage customers at scale, as handcrafted one-on-one relationships are cost-prohibitive and not really possible today. Develop logical decision trees that allow customers to move through different paths based on their behavior and preferences. As customers interact with the pharma company during the journey, they should be automatically routed down paths that best fit their behaviors, requirements, and expectations.
- **Re-evaluate the highest-value POIs frequently and focus on updating them.** Build logic into interactions that automatically move customers down different paths based on how they engage with a message or based on attributes in their customer profile, like title or geography. Test different types of channels and different messages to see which perform the best. Develop a “crawl, walk, run” strategy. Your first customer journey may be as simple as a series of three emails. Then, once engaged with the customer, the project team can add communications across an increasing number of channels depending on customer behavior and products and services consumed.
- **Measure and adapt the journey using analytics and metrics.** Analyze every interaction to offer the best experience possible by examining metrics for what is and isn't working. Continually assess where bad experiences are creating problems, and design a more positive experience. Use journey analytics to help evaluate customer engagements across all channels. Set goals for every interaction and continually monitor how customers perform against these goals. Modify interactions where necessary to better meet customer needs. Companies with customers who are more satisfied deliver measurable results; these customers spend more money, are more willing to recommend the brand, and are less likely to churn.

Develop journey maps that allow functional executives and key customer experience management leaders to visualize all customer touchpoints and channels that have the highest value for the customer.

Case Study: Roche Diabetes Care Is Transforming from Medical Devices to Disease Management

If left untreated, diabetes is a debilitating and lethal disease. The biggest hurdle for patients is adhering to an ongoing treatment plan: patients must manage the disease 24 hours per day, every day of the year, for the rest of their lives. The threat can be quite serious: uncontrolled diabetes can lead to long-term complications like cardiovascular disease, neuropathy, kidney damage, retinopathy, and more – foot damage from diabetes can sometimes even lead to amputation. Plus, shame and stigma can compound the treatment challenge because patients may mistakenly feel “guilt, shame, embarrassment, isolation or blame.”⁹

Despite the health risks associated with uncontrolled diabetes, people with diabetes still struggle to reach their health goals. In fact, almost 50% of people with diabetes in the United States are not at the recommended HbA1c goal.¹⁰ Day-to-day issues arise, obstacles begin to multiply, and these can begin to overwhelm any perceived short-term or long-term benefit of managing diabetes.

Obstacles to good self-care include depression, poor social support, and environmental pressures such as family, work, and other competing demands. They may also include harmful health beliefs that can range from “diabetes is not a big deal” to “diabetes is a death sentence.” Both these obstacles and beliefs can interfere and prevent participation in diabetes self-management.

Roche Diabetes Care, a business unit within the Roche Group, is a pioneer in the development of blood glucose monitoring systems and a global leader for diabetes management systems and services. Roche Diabetes Care is taking steps to reduce information overload and help people with diabetes overcome common barriers to self-

management.¹¹ From a strategic perspective, the division’s focus has shifted from being a medical device company to helping people with diabetes live better lives while managing their health. To achieve this goal, the Roche Diabetes Care division has focused on 1) innovating how it engages with diabetes patients over the course of their disease, and 2) providing a significantly better customer experience throughout each patient’s lifelong treatment plan.

The global Marketing Strategy and Services team is working to move patient interactions to personalized 1:1 marketing. The team is pursuing customer experience journey mapping and automation, drawn from primary research with patients and internal marketing staff. The team recently conducted a regional workshop with marketers from the EMEA region to better understand the life of an insulin pump user. They examined questions such as these:

- How do patients acquire the insulin pump product?
- How do they use the pump?
- When do they decide to get a new one?
- What is the typical experience for a patient the first time they use a pump?
- What is a day in the life of a pump patient like?
- How does the day in the life of a pump patient change over time?
- What does it feel like to be on a pump?
- Does the patient understand the effects of food on their disease?
- When and how often does the patient exercise?

The Marketing Strategy and Services team is focused on a three-phase approach to help the company stay more closely connected to the person with diabetes, work to identify when barriers or obstacles present themselves, and provide content solutions that include coaching and psychological support to enable improved self-management.

- Phase 1 of the automation project is to help get each patient on the right track immediately after receiving their insulin pump. This includes getting started with best practices, spot checks on progress, and educational information.
- Phase 2 focuses on helping patients plan for important life events and activities such as attending parties, weddings, and other celebrations.
- Phase 3 involves helping patients “find their tribe” so they can communicate, connect with, and learn from other people with diabetes.

By leveraging and integrating data, the business can better focus on what matters to each individual customer. And, Roche Diabetes Care can deliver content at the right time, based on the insights gained through customer journey mapping. The key is to reach patients with small, consumable amounts of information when they need it. The communication channels for 1:1 delivery include the following:

- Outbound telephone calls
- Text messages
- Emails
- Social messaging via Twitter and Facebook
- Printed materials
- Advertising

With this, Roche Diabetes Care aims to support customers throughout their journey with diabetes, helping them to achieve better control and live life more fully.

Build Awareness, Use Data, and Focus on Results to Achieve Success

Customer journey strategies and journey mapping are essential aspects of CEM and digital transformation initiatives. Gaining mastery of journey strategy is essential for marketing and customer experience teams. When initiating a journey strategy, follow these steps to obtain the greatest benefit from using journey maps:

- 1. Consolidate customer information.** Instead of looking at just part of a transaction or experience, use the customer journey tool to document the full end-to-end customer experience, while also collecting comprehensive customer data and information for customer journey decision-making.
- 2. Educate senior executives.** Many C-suite executives are unaware of or do not understand how to develop a journey strategy. Develop a plan for educating senior executives, and even board members, in CEM and the need for a journey strategy before selecting any tools or technologies. Proactively collect customer feedback through a formalized voice of the customer program that provides alerts from customer services and sentiment in social channels.

- 3. Use journey maps as a communication and collaboration tool.** Journey maps are more than attractive diagrams; they provide valuable data and also offer an effective way to communicate throughout the organization about how customer journeys currently work and how they should work. Don't get sidetracked by visualization aesthetics but instead focus on gaining insights and reaching consensus while communicating across the organization. This includes focusing on the customer data gathered through the journey and making sure it is accurate, actionable, and high-impact.

The art of a successful journey strategy is understanding how to put the customer at the center of everything. The customer journeys for an organization's brands are in the customers' control, not the company's. Remember at all times that customers have the power to decide 1) how they want to interact with your organization, 2) what they want to engage you for, 3) which channel they want to engage in, and 4) what time they want to engage.

Organizations that are successful in using journey strategies have high-performance marketing teams that have adopted a customer journey strategy as part of their overall business strategy.

Endnotes

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- 11 The Roche Group, headquartered in Basel, Switzerland, is active in over 100 countries and employed more than 94,000 people worldwide in 2016. Roche Diabetes Care, a business unit within the Roche Group, is a pioneer in the development of blood glucose monitoring systems and a global leader for diabetes management systems and services. For more than 40 years, the Accu-Chek brand has been dedicated to enabling people with diabetes to live life as normally and actively as possible as well as to empowering healthcare professionals to manage their patients' condition in an optimal way. Today, the Accu-Chek portfolio offers people with diabetes and healthcare professionals innovative products and impactful solutions for convenient, efficient, and effective diabetes management, from glucose monitoring through information management to insulin delivery. The Accu-Chek brand encompasses blood glucose meters, continuous glucose monitoring systems, insulin delivery systems, lancing devices, data management, and education programs – contributing to an improved medical outcome.

About Digital Clarity Group



Digital Clarity Group is a research-based advisory firm focused on the content, technologies, and practices that drive world-class customer experience. Global organizations depend on our insight, reports, and consulting services to help them turn digital disruption into digital advantage. As analysts, we cover the customer experience management (CEM) footprint – those organizational capabilities and competencies that impact the experience delivered to customers and prospects. In our view, the CEM footprint overlays content management, marketing automation, e-commerce, social media management, collaboration, customer relationship management, localization, and search. As consultants, we believe that education and advice leading to successful CEM is only possible by actively engaging with all participants in the CEM solutions ecosystem. In keeping with this philosophy, we work with enterprise adopters of CEM solutions, technology vendors that develop and market CEM systems and tools, and service providers who implement solutions, including systems integrators and digital agencies.

Contact Us

Email:

info@digitalclaritygroup.com

Twitter: [@just_clarity](https://twitter.com/just_clarity)

www.digitalclaritygroup.com