Building a Customer-Centric Organization

Effective strategies for navigating the journey
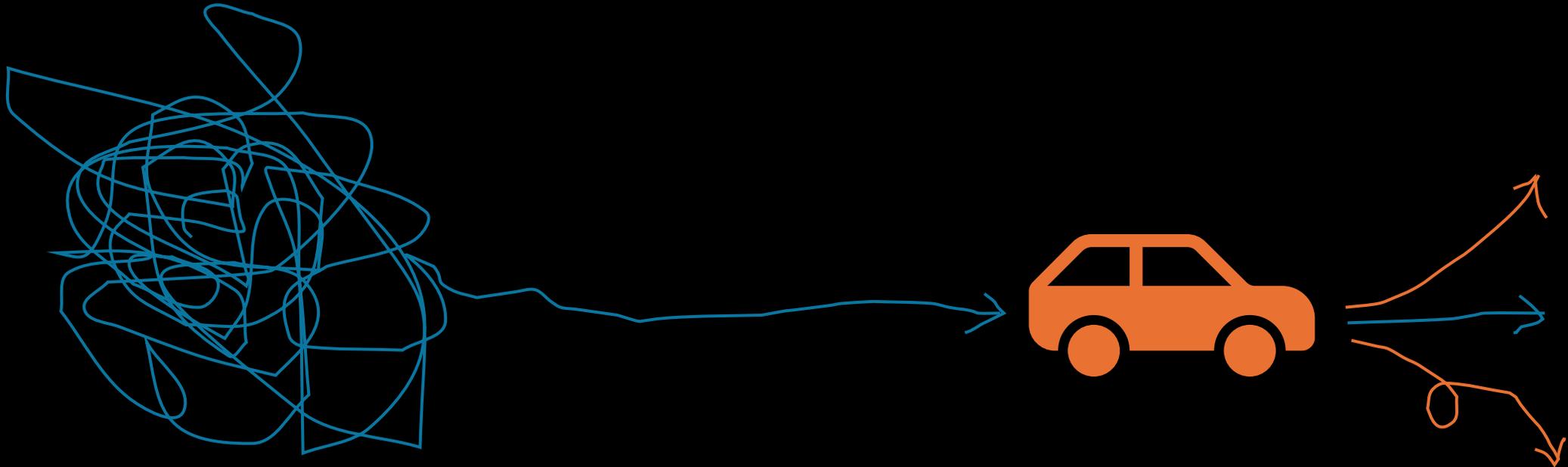
Stefan Turnwald

Speaker

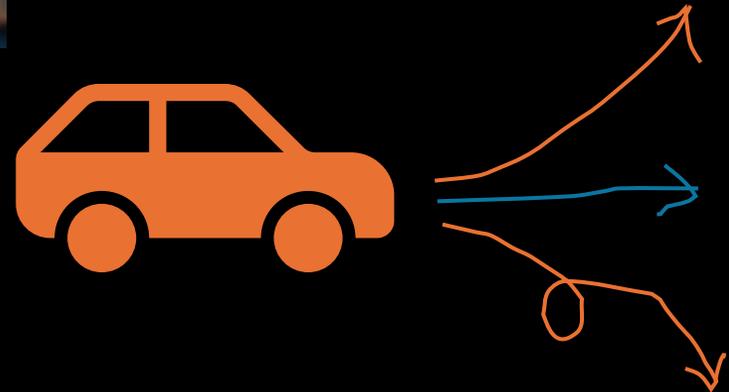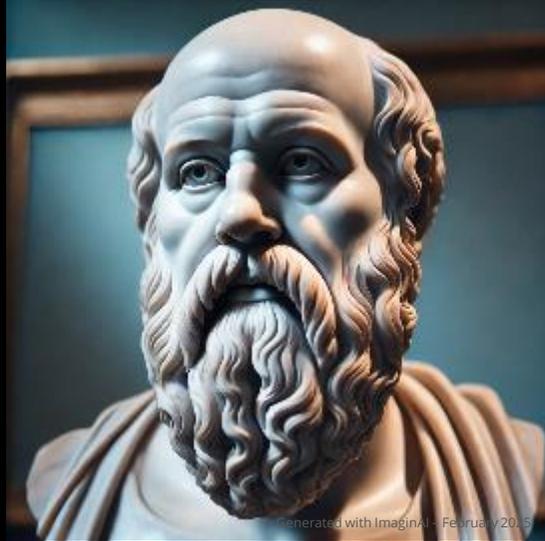**Operational Excellence & Process Transformation Summit**

KEYNOTION Summits

09-11 April 2025
Munich, Germany

Bridging Current Challenges... ... with Future Excellence

Field Operations in Pharma

Learning from the last mile to the customer in the pharmaceutical and life sciences industry

Generated with Photorealistic Image GPT – August 2024

- Ensuring product success in a **complex B2B2C healthcare ecosystem**.

- Operating within a **multi-stakeholder healthcare landscape**.

- **In-person engagement remains crucial**, even with the rise of digital channels..

- Engagements frequently **conclude with mere intent** rather than immediate action.

Operational Excellence & Process Transformation Summit
KEYNOTION Summits – 09-11 April 2025 – Munich, Germany

CEEEcon

Customer-Centered vs. Product-Centered Communication
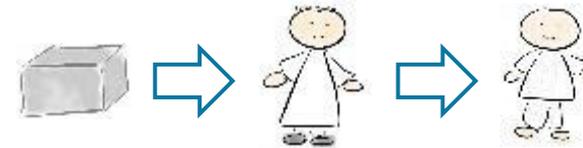*Which Approach Drives Real Engagement?*

Patient-Centered and Prescriber-Focused

1. **Patient:** Start with **patient context**.
2. **Prescriber:** Address **prescriber's needs**.
3. **Product:** Position **product as the solution**.

This leads to **consultative engagement and trust-based selling**.

Product-Focused

1. **Product:** Start with **product features**.
2. **Prescriber:** Ask the **prescriber**…
3. **Patient:** … to **find patients**.

This leads to **transactional advertising of product benefits**.

Operational Excellence & Process Transformation Summit
KEYNOTION Summits – 09-11 April 2025 – Munich, Germany

CEEEcon®

Are your reps living up to their full potential?

Or have you turned them into your most expensive advertising channel?

Barriers to Customer-Centered Communication

Do Reps Have the Right Knowledge to Engage?

Patient-Centered and Prescriber-Focused Flow

Patient → Prescriber → Product

Knowledge "Buckets"

Patient Knowledge   Prescriber Knowledge   Product Knowledge

CEEEcon

Barriers to Customer-Centered Communication

Do Reps Have the Right Knowledge to Engage?
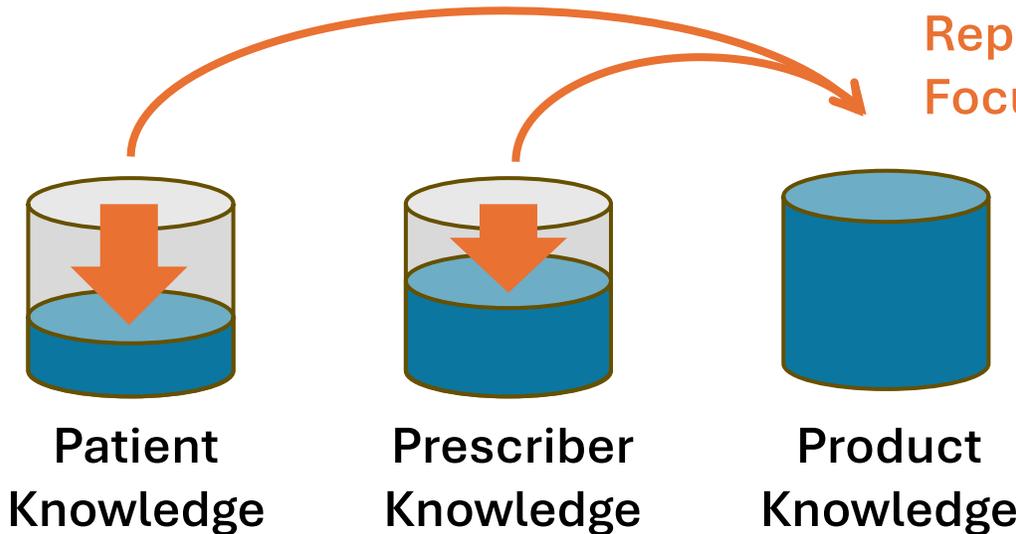
Patient-Centered and Prescriber-Focused Flow

Patient → Prescriber → Product

Reps Tend to Default to Product-Focused Talk Due to Knowledge Gaps

Knowledge "Buckets"

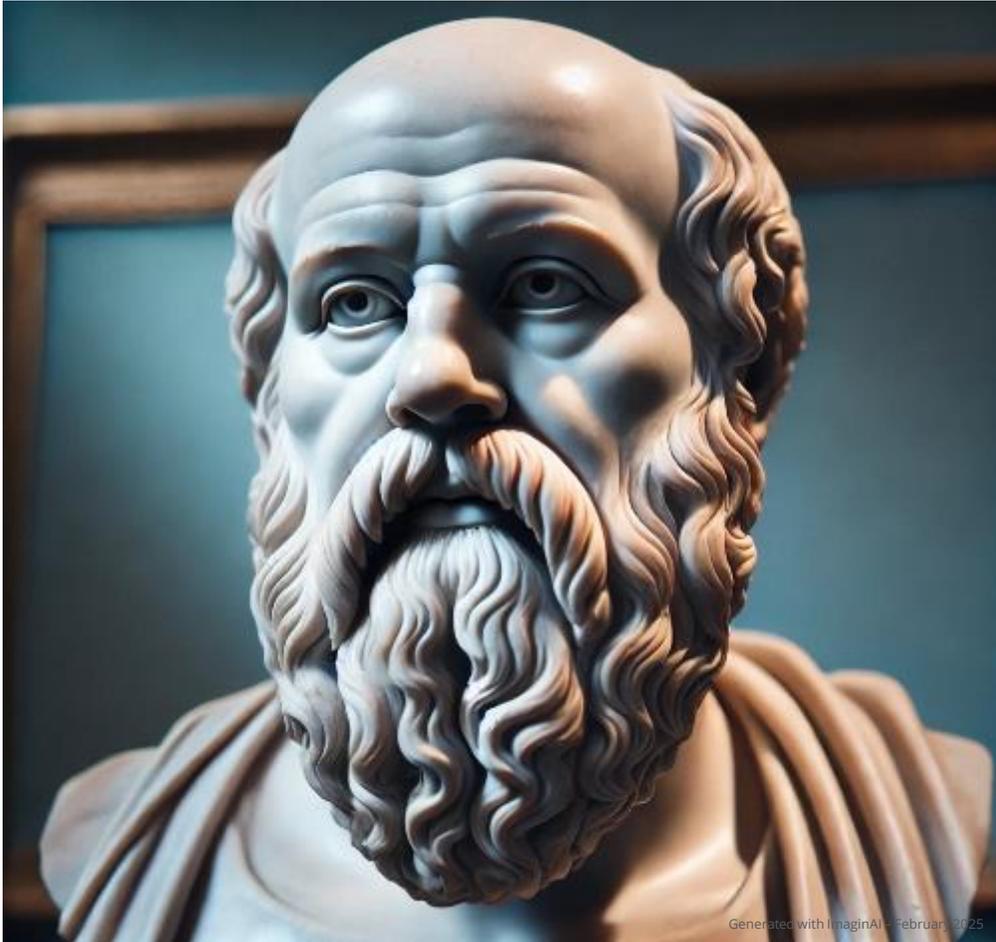Patient Knowledge | Prescriber Knowledge | Product Knowledge

CEEEcon

"I spend 90% of my facetime with customers filling my knowledge gaps—only 10% sharing my expertise."

Top-Performing Representative
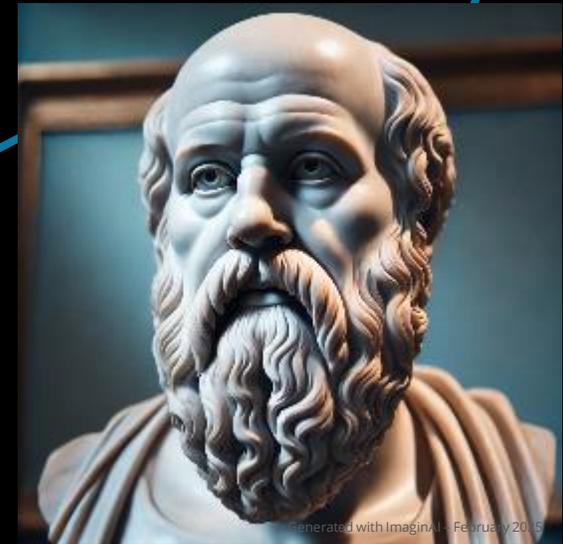
Socrates' Principles

The foundation of critical thinking

Generated with ImaginAI - February 2025

Question Everything: Challenge assumptions and uncover deeper insights.

Define Terms Clearly: Ensure precise language to align discussions.

Follow the Evidence: Base decisions on facts, not biases.

Engage in Dialogue: Foster two-way conversations through guided questions.

Acknowledge Ignorance: Wisdom starts with admitting what we don't know.
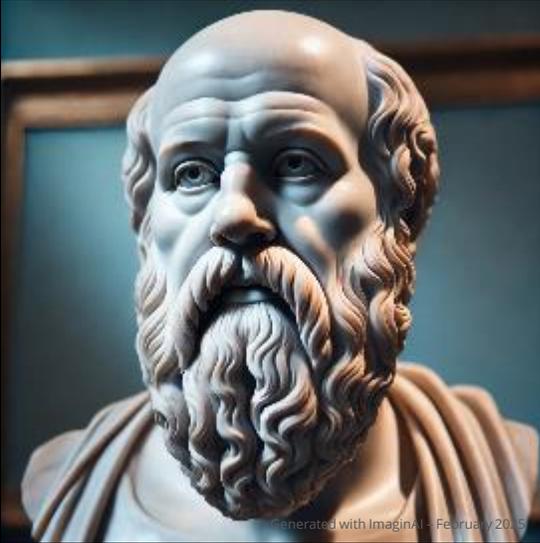
Operational Excellence & Process Transformation Summit
KEYNOTION Summits – 09-11 April 2025 – Munich, Germany

CEEEcon ®

What is the impact of the Socratic approach?

→ **Reps engaging with customers**
→ Analytics and AI
→ Leadership and Transformation

Engagement Experiences Drive Business Outcomes

Excellence in customer engagement in action

Positive Employee Experiences

Positive Customer Experiences

Generated with Photorealistic Image GPT – August 2024

Maximized RoI
Sustained Investments
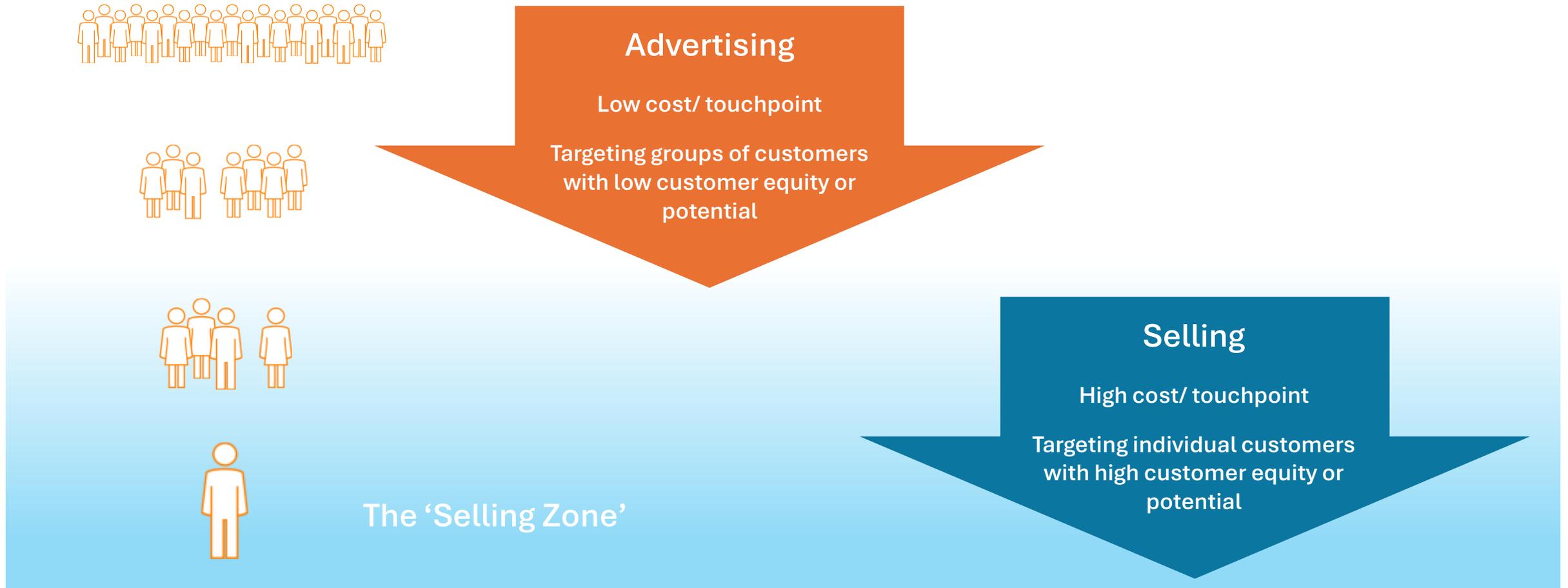High Motivation
Continuous Improvement

Continuous Access
Competitive Advantage
Improved Patient Outcomes
Business Success

↗ Representatives must adopt a Socratic approach to foster meaningful dialogue. Without it, negative engagement experiences are inevitable.

↗ When representatives' confidence and sense of purpose are undermined, both employee and customer experiences deteriorate.

Operational Excellence & Process Transformation Summit
KEYNOTION Summits – 09-11 April 2025 – Munich, Germany

CEEEcon®

Entering The Selling Zone

Where full individualization is relevant and personal engagement is needed

Advertising

Low cost/ touchpoint

Targeting groups of customers with low customer equity or potential

Selling

High cost/ touchpoint

Targeting individual customers with high customer equity or potential

The 'Selling Zone'

Operational Excellence & Process Transformation Summit
KEYNOTION Summits – 09-11 April 2025 – Munich, Germany

CEEEcon ®

Entering The Selling Zone

Where full individualization is relevant and personal engagement is needed

Advertising

Low cost/ touchpoint

Targeting groups of customers with low customer equity or potential

Analytics-driven Approaches: Extrapolating the past into the probable future.

Real-time Engagement: Verifying assumptions in the moment of the engagement.

Selling

High cost/ touchpoint

Targeting individual customers with high customer equity or potential

The 'Selling Zone'

Operational Excellence & Process Transformation Summit
KEYNOTION Summits – 09-11 April 2025 – Munich, Germany

CEEEcon

What is the impact of the Socratic approach?

→ Reps engaging with customers

→ **Analytics and AI**

→ Leadership and Transformation

AI and Analytics in Customer Engagement

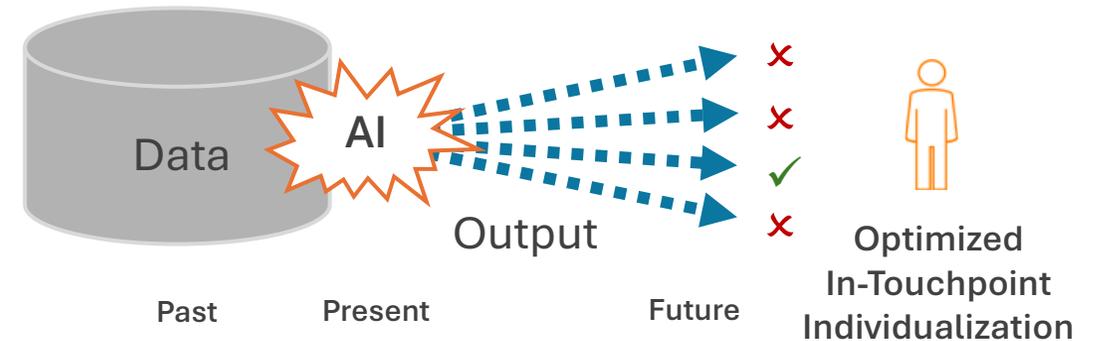*Evolving from the one 'Next Best Action' to optimized In-touchpoint individualization*

Advertising: Statistical Fit

- Analytics **extrapolate from past data** to predict the **most probable future scenario**.
- The proposed solution is designed to match the **statistical average** of a target audience — not individuals
- **Key Limitation:** Statistical fit focuses on probability, not situational relevance.
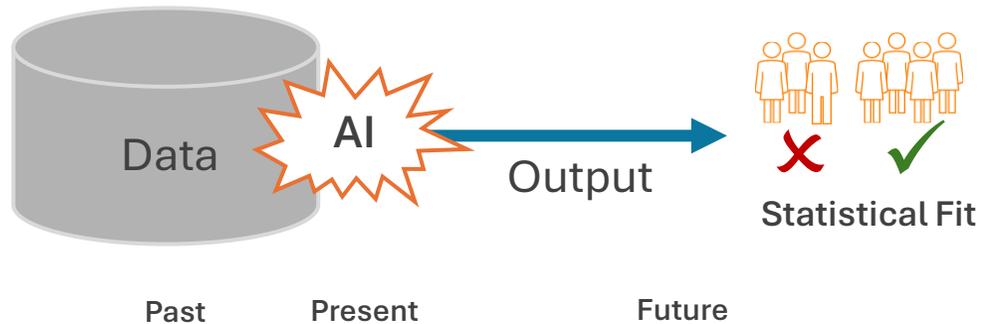
Selling: Optimized In-Touchpoint Individualization

- Analytics provide **alternative recommendations** for various **potential future scenarios**.
- The representative (or system) selects the **best-fit solution in real time**, after evaluating situational relevance.
- **Key Advantage:** Real-time selection enables **individualized engagement** within the specific context of the touchpoint.
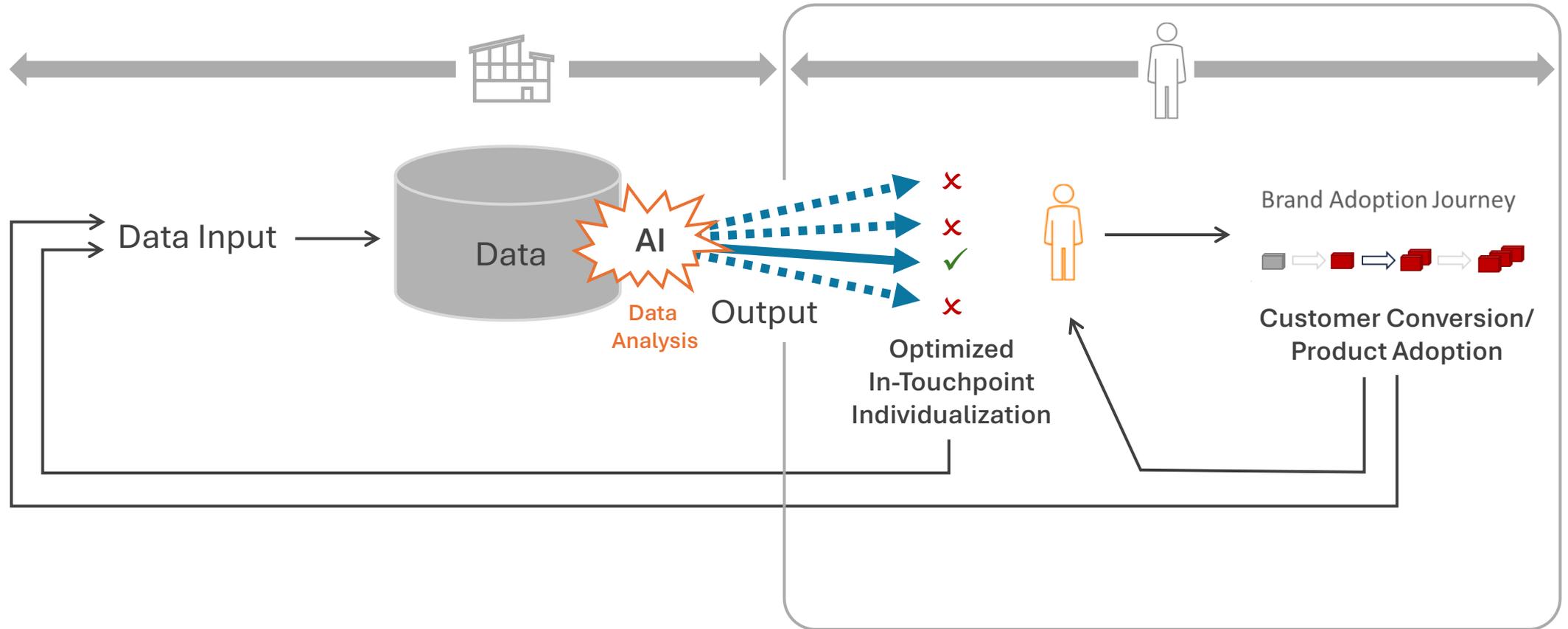

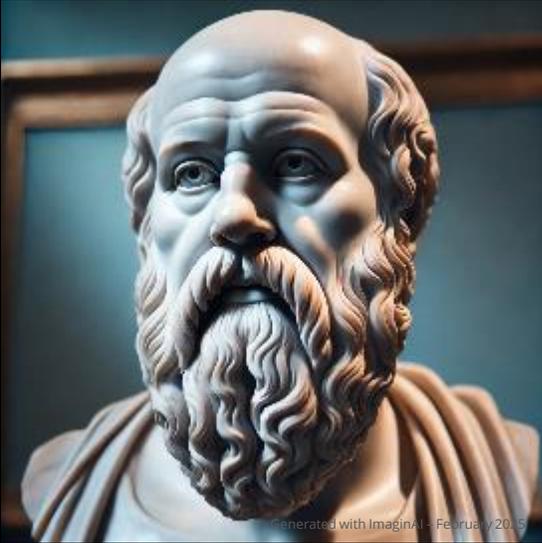Data — AI — Output — Statistical Fit

Past — Present — Future

Data — AI — Output — Optimized In-Touchpoint Individualization

Past — Present — Future

CEEEcon

Do you want to have informed orchestrators?

Or do you prefer orchestrated executors?

AI and Analytics in the Management of Opportunities

Socratic elements and human process steps in data-driven business optimization

Operational Excellence & Process Transformation Summit
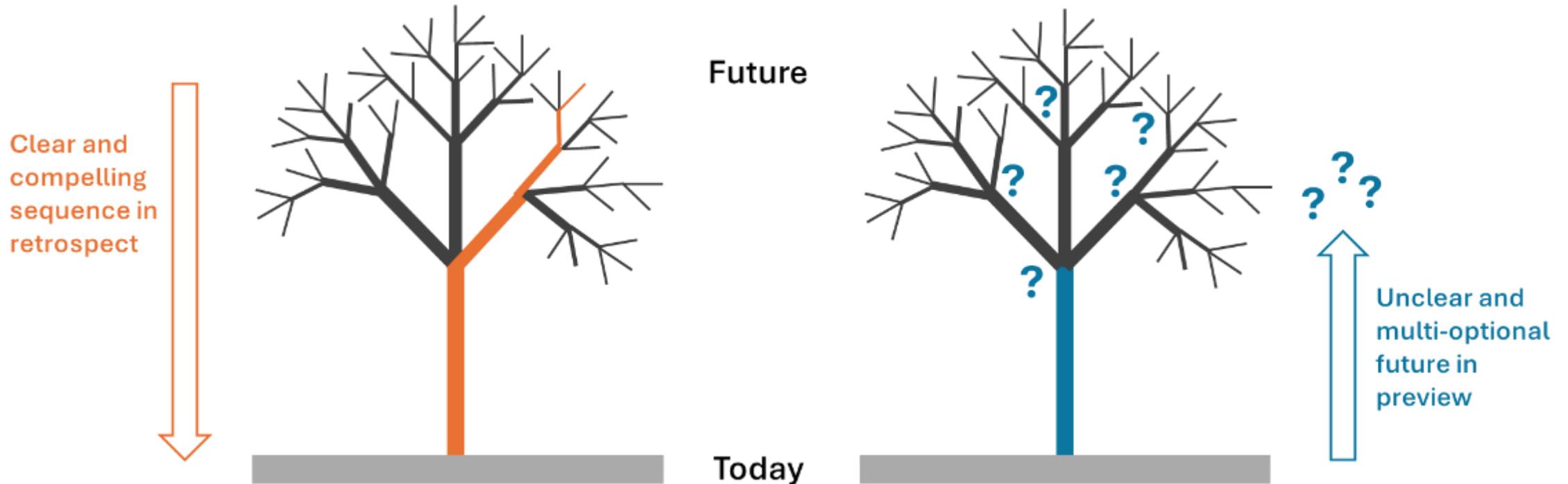**KEYNOTION Summits – 09-11 April 2025 – Munich, Germany**

What is the impact of the Socratic approach?

→ Reps engaging with customers

→ Analytics and AI

→ **Leadership and Transformation**

Relation of Present and Future in Retrospect and Preview

"In der Zukunft sind wir klüger." (German idiom: We will be smarter in future.)

Clear and compelling sequence in retrospect

Future

Today

Unclear and multi-optional future in preview

Operational Excellence & Process Transformation Summit
KEYNOTION Summits – 09-11 April 2025 – Munich, Germany

The Role of the Leadership: Shaping Desirable Futures

Engage the customer-facing roles in shaping the joint future

- Provide desirable future scenarios to your employees and engage them in the tension-based work paving the path forward.

- Establish the robust foundation for the next wave of transformation to come.

- Continuously adjust the desirable futures to the progress of the change.
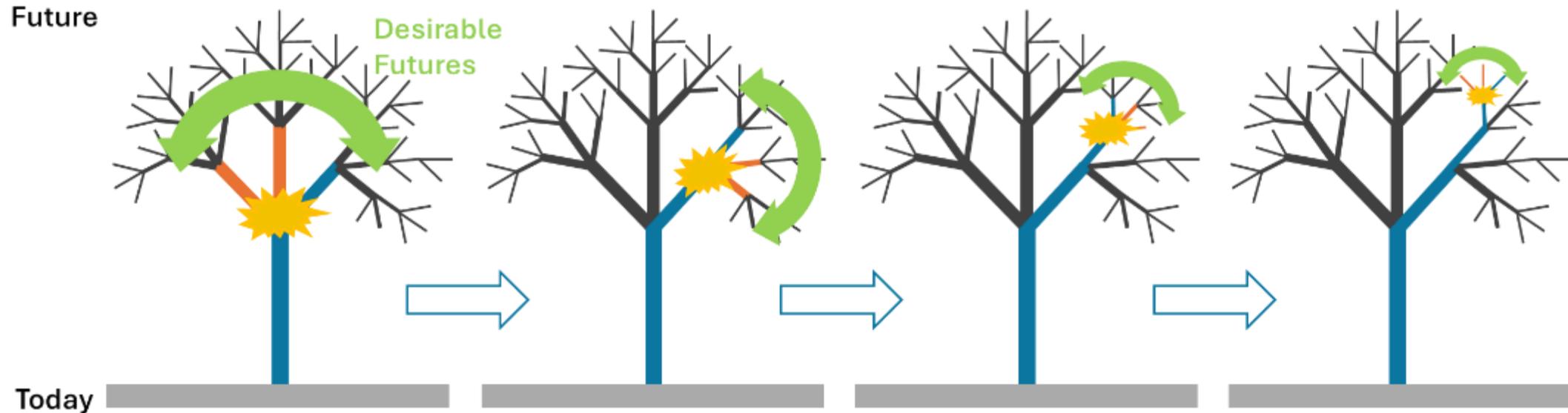
Three Pillars of Organization and Leadership in Disruptive Times

Adaptable transformation framework allowing for inclusive and employee-focused transformation – Compatible with new work models and tools

Sustainable Purpose

Give the transformation its purpose and direction!

What drives the association and the individual associate?

Bonding power, pride and inspiration for leaders, associates and customers.

Connected Resources

Foster collaboration and overcome silos for the better outcome!

Are the associates provided with all that is required to perform?

Ensure the viability of the business execution while transforming.

Travelling Organization

Consider the changes and dynamics in the transforming organization!

Is the sustainable purpose actualized, and the commitment refreshed?

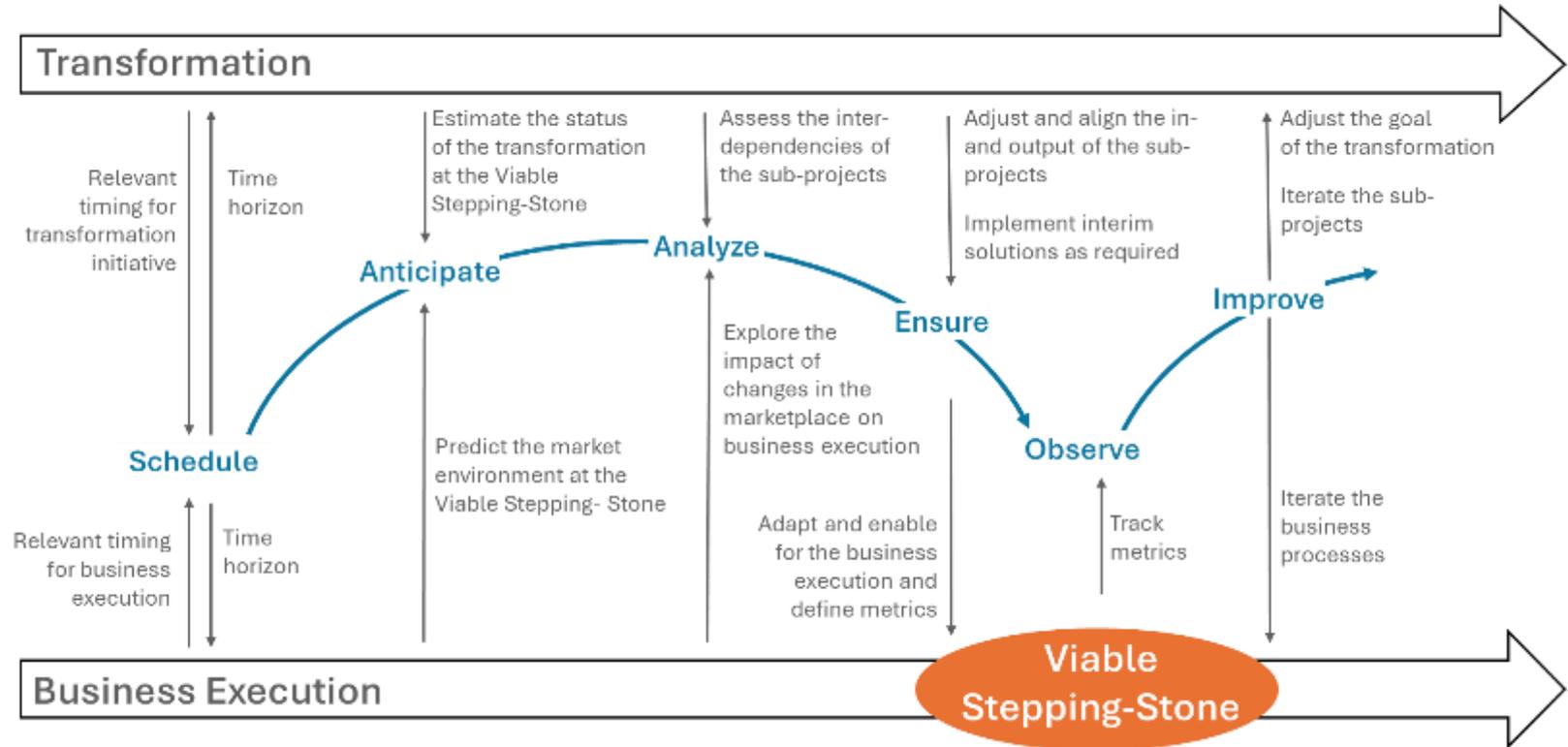*Be confident, leave behind the known, and embrace uncertainty.*

CEEEcon

Viable Stepping-Stones

Execution management framework for refocusing transformation initiatives on business execution – Compatible with new work models and tools

- Setting time horizons for challenging the viability of the business execution.

- Preparing for the impact of lead transformations.

- Planned assessment of alternative future scenarios.

- Platform to re-adjust the direction of travel

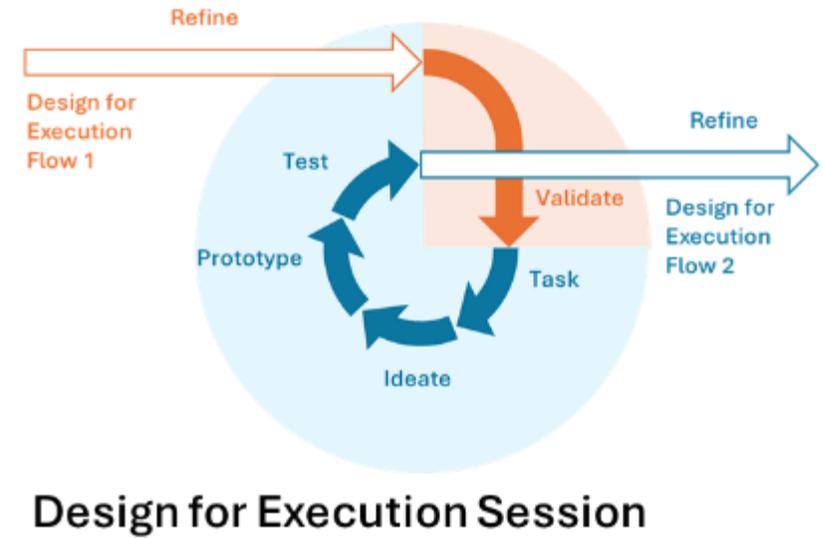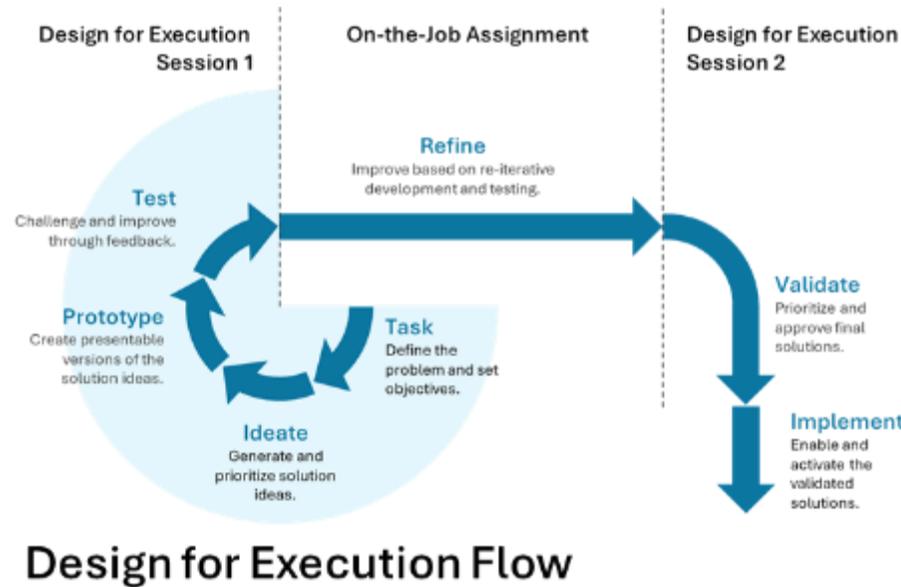- Integrating OKRs (Objectives and Key Results)

Operational Excellence & Process Transformation Summit
KEYNOTION Summits – 09-11 April 2025 – Munich, Germany

Design for Execution

Application of customer-focused and design-based methodologies to the business execution – – Compatible with new work models and tools

- Execution-focused framework, project structure, agenda outline, and activity flow.

- Framing tension-based work models and enabling problem solving and the development of solution.

- Complementary with Design Thinking flows, Human-Based Design protocols, and the Service Design framework.

Design for Execution Flow

Design for Execution Session

Operational Excellence & Process Transformation Summit
KEYNOTION Summits – 09-11 April 2025 – Munich, Germany

Synopsis of Transformation Frameworks and Tools

Socratic elements at all levels of the transformation framework

Time Horizon 4

Adjust to Travelling Organization

Time Horizon 3

Adjust to Travelling Organization

Time Horizon 2

Adjust to Travelling Organization

Time Horizon 1

Start

Pro-Actively Plan Decisions on Alternatives

Viable Stepping-Stone 4

2-3 OKR Cycles ←← Design for Execution Projects

Viable Stepping-Stone 3

2-3 OKR Cycles ←← Design for Execution Projects

Viable Stepping-Stone 2

2-3 OKR Cycles ←← Design for Execution Projects

Viable Stepping-Stone 1

2-3 OKR Cycles ←← Design for Execution Projects

3 Pillars of Leadership and Transformation
- Sustainable Purpose
- Connected Resources
- Travelling Organization

CEEEcon ®

Generated with ImaginAI - February 2025

Acknowledge Ignorance: Wisdom starts with admitting what we don't know.

Sustainable customer-centered transformation embraces knowledge gaps as opportunities for learning, growth, and deeper customer understanding.

Publications

English language - Start-Up Development in Traditionally Operating Industries: Regional Subsidiaries of Pharmaceutical Companies: https://link.springer.com/book/10.1007/978-3-030-63034-8

German language – Start-Up-Entwicklung in traditionell operierenden Branchen: Regionale Tochtergesellschaften von Pharmaunternehmen: https://link.springer.com/chapter/10.1007/978-3-031-57163-3_14

English language - Viable Stepping Stones along Transformation Journeys: Ensuring Business Execution while Transforming Diverse Organizations: https://link.springer.com/chapter/10.1007/978-3-030-95326-3_5

English language - Agile and Design-Based Methodologies in Sales and Service Delivery: The Application of Design for Execution to Field Teams in the Pharmaceutical Industry: https://link.springer.com/chapter/10.1007/978-3-030-95326-3_6

Recommended Reading

English language - https://link.springer.com/book/10.1007/978-3-030-63034-8

German language: https://link.springer.com/book/10.1007/978-3-031-23988-5

German language: https://shop.haufe.de/prod/zurueck-zur-zukunft?srsltid=AfmBOor2BRjvRLcUly_kiugFxMZ2Hh35VtH9t3uIyiW5APMfa2GlHUPQ

Stefan Turnwald
Customer Engagement Excellence Expert
Speaker, Facilitator, and Coach