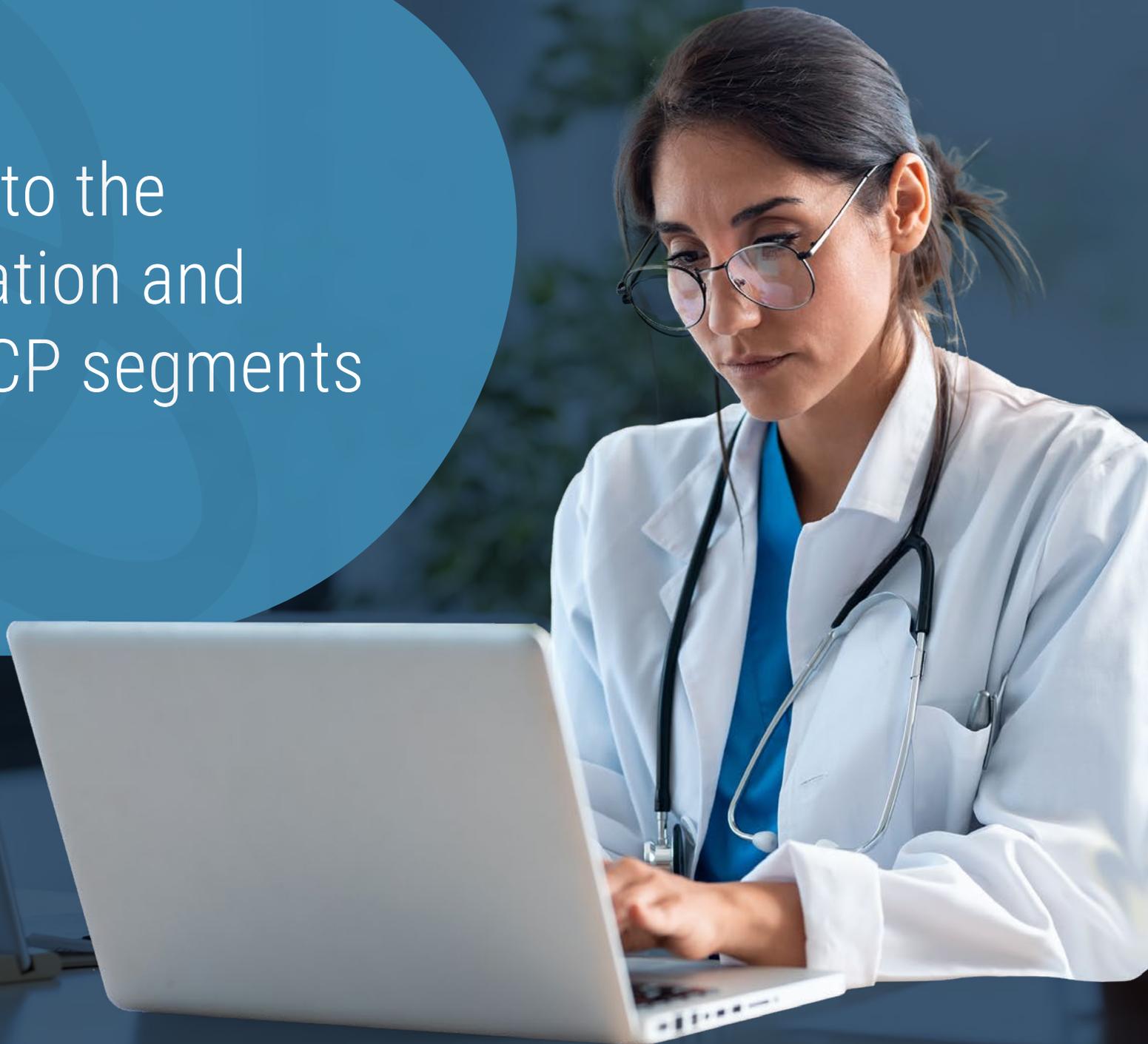


**Five key steps** to the  
successful creation and  
activation of HCP segments



Branding Science  
Group

**As the time HCPs spend with patients is short, much of their prescribing is habitual. A lot of brands are fighting for their attention, and changing habits is hard. If you want to drive a change to prescribing, your brand's communications must be 'spot on' in terms of delivering the right message to the right doctor at the right time, to nudge them along the adoption ladder.**

An impactful segmentation approach that leads to tailored brand communication has been shown to accelerate adoption, increase utilisation and increase customer satisfaction.

Yet, of the 50-plus brand plans that we at Branding Science have benchmarked, segmentations are often absent or relatively basic, and not set up to support the tailoring of impactful customer engagement.

Segmentations are tricky studies to get right – both in terms of their creation and their activation. You know when you get it right when the segments are recognisable, actionable and stable (i.e. will remain the same for at least a year and intuitively make sense to those interacting with customers).

In a recent webinar, Branding Science experts Lucy Ireland, Kaylie Fallon and Nick Ross shared the five key steps that are essential for the successful creation and activation of HCP segmentations.

Read our article below, to dive into their key insights – or, for a more in-depth look, **[click here to watch the webinar in full, on demand.](#)**



## Start with the **end in mind**

Before you embark on your segmentation, it's essential to first define its purpose.

### Ask yourself questions like:

- What are the main challenges the segmentation will address?
- Will it be used for HCP targeting, communications, or both?
- Which strategies will it be used for, and what behavioural change does it need to drive?
- Who needs to be involved in the process?
- How will the segmentation be activated?

All of this thinking is often skipped when we start building segmentations. Planning ahead like this ensures the segmentation process aligns with brand strategies and is ready to be integrated into CRM systems, communication strategies and local market plans.

A woman with curly hair, wearing a dark blue shirt, is seated at a white table in a meeting room, gesturing with her hands as she speaks to two men. The man on the left is wearing a blue shirt, and the man on the right is wearing a light-colored sweater. They are all looking towards each other. On the table, there is a laptop, a glass of water, a small potted plant, and a cup of coffee. Large windows in the background show a brick building and a clear sky.

Planning ahead like this ensures the segmentation process **aligns with brand strategies.**

## Embed segmentation into **brand strategy**

Segmentation should not just be a stand-alone process. Instead, it should be a core element of the brand planning process.

By understanding customer preferences, behaviours and barriers, segmentation can shape strategic direction, refine positioning, direct messaging strategy and identify growth opportunities.

Cross-functional teams, including marketing, sales and medical, should understand how segmentation supports tailored customer engagement and strategic direction-setting. The tailored customer engagement strategy should then be at the heart of your brand plan and overall brand strategy.



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## Choose the **right methodology**

While data-based, behavioural-only segmentations are tempting, due to their speed and simplicity, they often fail to capture the 'why' behind behaviours, and trying to infer the 'why' is really making untested assumptions. Including attitudinal and behavioural science elements enables a deeper understanding of customer motivations, beliefs and barriers. This allows for a more meaningful delivery of insights to support effective messaging and tailored engagement strategies.

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## Ensure actionability and localisation

A segmentation is only as good as its implementation. **To make it actionable, teams should:**

- Know which global campaigns and brand strategy the segmentation will inform, and ensure the timings work and that the segmentation is used. Involve everyone who will be using the segmentation in the activation sessions, including the brand's creative agency.
- Plan for localisation by adapting the global segmentation to reflect market-specific nuances and behaviours, by working with local teams to clearly align specific in-market tactics to each segment.
- Embed segmentation insights into CRM systems to create a feedback loop for continuous improvement and to allow easy use by your field teams.
- Develop clear strategies for embedding the segmentation across teams to ensure adoption and consistency.



Ensure that there is a **clear plan for how the segmentation will be used** at a local and global level, before starting.

## Engage stakeholders throughout the process

Involve end users, including potential sceptics, from the start to ensure buy-in. Key stakeholders should participate in kick-off meetings to share their hypotheses and priorities, provide input on critical questions for the quantitative questionnaire, and be actively involved in selecting the final segmentation solution.

By involving stakeholders early, and at the critical decision points, organisations can give them a sense of ownership and reassure them that they are playing a part in the segmentation's success.



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## Bonus tips for successful segmentation



### Universal segmentation

With the rise of more tailored engagement strategies, conversations are needed within client teams as to which segmentations need to be run. We have seen some clients run segmentations for all of their brands individually, whilst others have created universal segmentations to support a consistent approach to the same doctor group across brands.

To make this decision, you need to decide on which is more important – the relative simplicity of a universal segmentation built using the lens of who the HCPs are as people, where everyone only has to learn one solution/set of segments and your whole team ‘speaks the same language’ vs. taking a more brand tailored approach, with individual segmentations that deep dive into the specific challenges each brand faces, built using the lens of your brand and their behaviours related to it – an approach that may provide more valuable insights for brand strategy. Both approaches have their strengths and place within the development of a communication strategy, so the decision is ultimately linked to how the resulting HCP segments will be activated.



### Know when to update your segmentation

Good segmentations are stable, i.e. the segments remain relatively the same for at least a year (in terms of the key factors which identify them). However, they do need updating when there is a significant market change, such as a shift in customer behaviour due to market-changing new data or a differing view on how to treat the illness.

Behavioural segmentations will need more regular updates, as changes in guidelines, new treatments and other factors will drive a change in behaviour.



### Quick personas

When time is limited, consider building personas through qualitative research or as a team-building exercise as a temporary solution. However, be mindful of potential biases and limitations compared to a quantitative segmentation.

A key decision that you need to make is whether you want a universal or brand specific segmentation, **as these two types can't be merged effectively.**

## Final thoughts

Of course, effective HCP segmentation requires data analysis, but it also demands strategic planning, cross-functional collaboration and a commitment to action. By following these five key steps and keeping stakeholders engaged throughout the process, organisations can create impactful segmentations that drive meaningful customer engagement and commercial success.



[Click here to watch the webinar in full, on demand.](#)

## GET IN TOUCH



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