

Patients Are No Longer PATIENT FOR SOLUTIONS

► *Patient-centricity is driving innovation across all areas of development, delivery, and care. New tools, solutions, and apps are making it easier than ever for patients to be compliant, for physicians to monitor patient progress, and for caregivers to help support patients.*

Over the past few years, the term patient-centric has been used so frequently that it almost has no meaning. But despite the centrality over the concept, the strategy of putting patients squarely in the middle of what the industry is doing and where it needs to go is sound. In parallel, the concept of patient engagement is also a topic that has been explored in depth over the past few years, from engaging patients in clinical trials to engaging patients so they take their approved medicines to how these medicines are being paid for.

Experts say patient engagement is of interest to all of the stakeholders in the healthcare industry — physicians, healthcare professionals, providers, payers, technologists, planners, and even the government. Furthermore, getting patients to engage in their healthcare process vis-a-vis technology is a crucial task that can be accomplished by new and emerging tools and services. Patient engagement technology — hardware, software, and services — enable patients and their caregivers to be involved in their self-care. Engaging patients in their self-care significantly increases understanding of their health conditions and allows patients to make informed healthcare related decisions. These technologies encourage patients to moderate their behavior in alignment with their agreed care plan and motivate self-care behavior. Implementation of patient engagement technologies allows organizations to quickly and securely share accurate time sensitive data with all the participants in the healthcare process regardless of their role.

Marketsandmarkets.com, an industry consultancy and data aggregator, has found that factors such as legislative reforms of the Affordable Care Act (ACA) in the U.S., demand for improved quality of care, the Meaningful Use (MU) program of federal government's Office of the National Coordinator's (ONC), increasing awareness of mobile health (mHealth), enhanced worker productivity, rising aging population, and incentives by various governments for the adoption of patient engagement technology are driving the growth of the market.

Technology Trends

As the industry looks to leverage technol-

ogy to increase access to information and drive better patient outcomes it is facing the enormous challenges of privacy and security that are perhaps more worrisome in healthcare than in any other industry. The experts at Hewlett Packard have identified several technology trends that are transforming every aspect of the way patients live.

1. Smartphones, apps, and wearables are empowering patients, doctors, and caregivers.

In today's health-conscious world, it's hard to miss the ubiquitous Fitbit and other personal monitoring tools that help people track fitness activities, sleep patterns, blood pressure and caloric intake. But these tools are just the beginning. Increasingly sophisticated apps and nanotechnology will not only empower individuals to track their own health, they will also deliver troves of actionable data to the medical community. The next step will be integrating all of that data into our healthcare system to help anticipate and prevent broader health issues.

2. Big data will uncover patterns, problems, and opportunities in healthcare.

Harnessing health data allows doctors and researchers to improve collaboration, better understand illnesses, and more effectively allocate resources to get the right treatments to the right patients at the right time. It can also help identify diseases and outbreaks, helping to minimize — and even eliminate — pandemics. But capturing all of that data is not enough. To be truly useful, it must also be easily accessible, which is where the cloud comes in.

3. Cloud computing will unlock the valuable insights that live in healthcare data.

For researchers, cloud technology will make massive amounts of healthcare data easy to access and analyze, facilitating innovation and rapid response to warning signals. For doctors and patients, transitioning medical records from paper to digital and then moving them to the cloud, will improve the everyday needs of the medical community — streamlining billing, giving patients access to their information, and providing doctors with a more complete picture of a patient's medical history.

4. Security risks must be taken seriously.

According to the Identity Theft Resource Center, 44% of all registered data breaches in 2013 targeted medical companies. Cyber criminals can target healthcare companies just like they do retailers, with theft of patients' identities, payment information, and even data from medical monitoring devices. With so much personal health information going into the cloud, there is the need for technology — and the commitment — to properly protect it.

5. Computing power and energy efficiency will be star players behind the scenes of healthcare.

By 2020, 30 billion connected devices will generate unprecedented amounts of data, and the world's data centers will consume up to 30% of the world's electricity to support them. Simply put, the current course is not sustainable. A more tangible example of computing power in healthcare can be seen in artificial limbs. Icelandic company, Össur, has created the world's first micro-processor joint system that continuously adapts to the user and the environment.

6. 3D printing will spur a new wave of growth and innovation in healthcare.

As 3D printing technology advances, its medical uses are becoming increasingly clear. It will revolutionize the manufacturing of medical devices and surgical tools — personalized prosthetic limbs and other body parts, precision drug dispensing, fluidics modeling — the possibilities continue.

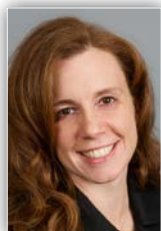
7. Telemedicine will expand healthcare into our homes and beyond.

Telehealth, which allows patients to connect with doctors using mobile devices and video chat, is gaining traction as a cost-effective way for patients to receive care and will completely change the view of the traditional doctor's visit. As telehealth becomes more widespread, doctor-patient interactions will become more frequent and expand not just into homes but into remote areas of the world.

8. Global health will improve with the expansion of technology to developing countries.

Nowhere are these emerging technolo-

EXECUTIVE VIEWPOINTS



**LAURA MOORE, EDD,
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Health Psychology
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INTEGRATIVE DEVICES**LEAD TO PERSONALIZED MESSAGES**

As an industry, we are very excited about integrative devices that record live information such as blood sugar, heart rate, and exercise. But, collecting data is only half the story; leveraging that data is what truly counts. We look at each bit of information as a communication opportunity for the healthcare team to reach out to a patient with timely, supportive feedback. Personalization is key. The message can't be generic or you will quickly lose their engagement.

TWO-WAY DIALOGUE KEY

For a program to be patient-centric, there needs to be a two-way dialogue. Patients must have a voice in the process. Research shows that engaged patients who have open communication with their healthcare team are more likely to be adherent to their prescribed treatment. It's equally important that every message is consistent, whether delivered by the nurse or HCP, the pharmacy, dietician, or pharma company. If messaging is not aligned, a patient may get confused and disengage from the program.



WENDY WHITE
Senior VP, Rare
Disease, Dohmen
Life Science Services

A JOURNEY OF CARE

Caring for rare disease patients requires the ability to know when and how technology can enhance the patient's emotional, medical, and treatment journeys. Advancements in technology are certainly bringing increased efficiencies to everything from data collection and education to distri-

bution and reimbursements, but it's knowing when and how a patient wants live, one-on-one support that makes the real difference. Support apps and processes like picking delivery dates for home delivery, secure texting with healthcare providers, and automatic data collection to improve standards of care are changing the landscape. Technology, in support of whole patient care, helps balance the benefits of efficiency with the importance of one-on-one patient support.

CREATING A POSITIVE IMPACT

Patient-centricity starts with properly researching and understanding the patient journey, and then using those insights to inform and improve our patient programs. Our business is about so much more than collecting reimbursements or shipping products. It's about providing regular outreach, education and resources to patients and caregivers, on a schedule and in a communication channel that works best for them. Understanding the emotional, medical, and physical needs of our clients' patients has a direct impact on patient compliance, outcomes and ultimately, their quality of life.



ROB PETERS
Senior VP, Strategy,
MicroMass
Communications Inc.

EVIDENCE-BASED APPROACHES

Patient technologies and solutions are slowly becoming more valuable and effective at changing patient outcomes for the better. We are finally reaching a point where these solutions are receiving adequate attention from developers and have moved beyond novelty and functional support to offer more sophisticated, evidence-based approaches. It is increasingly common to see patient support solutions that leverage proven behavior change strategies and use technology to create experiences capable of improving patient outcomes.

MOVING BEYOND THE PILL

Companies are increasing their investment in beyond-the-pill services. These approaches are going beyond the traditional product-centric focus to meet the whole patient needs.

Instead of product messaging — providing access to a product, helping them remain on therapy, and reducing the product cost — the whole patient needs approach helps to uncover unmet, nonclinical needs, and provide support that is aligned with everyday patient struggles. Ultimately, if solutions and programs facilitate better patient outcomes, then the brand will maintain continued success.



CHRIS CULLMANN
Senior VP, Engagement
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TRENDING TECH

Wearable technology continues to mature. Apple continues to make investments and fortify its position in the U.S. healthcare market. The recent purchase of Glimpse, a company focused on useful sharing of personal health data, is a great example. The recent evolution of bots and programmatic response tools allows for intelligent interfaces with patients, and enables a new kind of telemedicine. These are a few examples to watch moving forward.

PRIVACY PLAYS A PARAMOUNT PART

Privacy has become a paramount topic for healthcare, and is reflected in how personal healthcare data are stored — at home and in large hospital networks. In the provision of care, patients will see new kinds of data entry forms, waiting room terminals, and enhanced security in patient portals. A new type of healthcare professional is ready to walk the patient through the benefits and detriments of recording, storing, and sharing his or her personal health data.

EXECUTIVE VIEWPOINTS



KENT THIELKE
Executive VP, Scientific
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PRA Health Sciences

A CONNECTED WORLD

Wearables seem to be the buzzword these days. The Internet of Things and the ability to connect patients to their healthcare providers, to researchers, to insurers, and to their own devices is progressing rapidly. The ability to collect a limitless number of data points on a patient is truly amazing; of course what we do with that data, and how to make it actually useful for drug development continues to be a work in progress.

DIRECT TO PATIENT IS THE KEY

Direct to patient education and interaction are critical success factors in drug development. The ability to leverage digital and social media and connect those interactions via big data, medical records, and personal devices allows patients more direct control over their treatment, care, and decision making.



ROB BLAZEK
Senior VP, Networks
and Analytics, Rx EDGE
Pharmacy Networks

TAPPING INTO TECHNOLOGY

For inspiration on the latest trends, I think back to the recent National Association of Chain Drug Stores Total Store Expo, an annual

gathering of pharmacy executives and their business partners, including those in the pharmaceutical industry. The event showcased some of the newest technologies that are driving value-added healthcare efforts and accelerating pharmacy's role in patient care. These included advancements in screening for acute and chronic conditions, medication synchronization programs, and new digital engagement tools.



KATHLEEN BONETTI
Executive VP,
Marketing, Rx EDGE
Pharmacy Networks

PATIENT SUPPORT INITIATIVES BASED**ON COMMUNICATIONS**

Brands have created novel and meaningful ways to support their patients, and are using multiple channels to generate awareness for these programs. Patient support initiatives are increasingly a key communication element of the campaigns we implement in the pharmacy setting. Examples include detailed doctor discussion guides, availability of patient ambassadors, step-by-step plans, free apps to track progress, and comprehensive reward/incentive programs. While brand-specific tactics vary, these approaches all share a common focus on assistance, encouragement, and knowledge-sharing.

RENEA MARSH JOHNSON
COO and Chief Compliance Officer,
VMS BioMarketing

**ENSURING COMMUNICATION PRIVACY**

Brands and patients should expect a high level of security, discipline, and expertise from any vendor providing patient adherence solutions. Vendors should demonstrate they are experienced in developing and implementing the necessary business processes and policies to protect sensitive information, including data collection, distribution, storage, and destruction. Privacy and security program SOPs should be collaboratively developed, approved, and reviewed with physical security and systems security with a chief compliance officer, security officer, and privacy officer.



JAMIE BURKS
Portfolio Patient
Solutions, UCB

CREATE A PATIENT FEEDBACK LOOP

The nurses we partner with have the same philosophy as our core company beliefs, to ensure genuine empathy and treatment support. We must continuously listen and hear feedback directly from patients, so we can evolve and improve our programs. Patients spend a limited amount of time with the doctor discussing their disease. As a company focused on the delivery of increased value, we are committed to supplementing that education to positively impact our patient's experience.

gies felt more profoundly than in developing countries, where medical attention is often delivered by volunteers with limited training. In sections of rural India, for example, HP is helping deliver radically improved healthcare by transforming shipping containers into cloud-enabled, mobile eHealth Centers. The goal is to use these developments to offer care to nearly everyone, no matter where they live.

9. Technology will help us understand the brain.

Technology is not only saving lives, it's opening up new frontiers that were previously unimaginable. In 2012, MIT researchers Xu Liu and Steve Ramirez found a way to implant memories into a brain, which has enormous consequences for mental health. And, a company called Emotiv has found a way to translate thoughts into action through neuro-headsets. These discoveries and cutting-edge tools will allow us to access brain information in noninvasive ways, opening up new spectrums of science and human understanding.

10. Innovation will unlock business opportunities.

With all of these technological advances before us, it's time for bold ideas. In some cases, existing regulations will need to evolve to allow for the coming innovation. But the possibilities represent an enormous business opportunity.

Those companies that can use technology to unlock solutions and provide better, lower-cost care to more people will thrive in this new world. **PV**

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technology innovator,
founder and CEO,
Emotiv Lifesciences

