

Connecting to the Patient in the Digital Age

► The old saying “the doctor will see you now” is being replaced with a heightened focus on the needs and expectations of the patient.

Pharmaceutical companies are shifting their mindset away from simply selling to physicians and toward serving the patient. But a truly patient-centric approach requires more than developing drugs to treat disease; it also requires providing services and support that patients want and need to manage their conditions and even to prevent the onset of disease.

The way forward is to provide concierge-like services that deliver patients customized solutions when and through which channels best suit them. However, a survey by Accenture found while pharmaceutical companies are investing in patient-centric services, awareness of these services among patients and healthcare professionals is limited. And while HCPs believe patient services will improve outcomes, only one-third of sales reps present such services as an integrated solution.

Nevertheless, more and more companies are investing in patient-centric capabilities, with a majority (91%) in an Accenture survey saying they expect to offer six or more patient services.

The objective, experts say, is to separate patient services from brand promotion and ensure patient-centric services and solutions are not simply an afterthought or add-on.

Changing the Approach

According to some statistics, there are more than 260,000 health apps worldwide and 70% of patient groups use at least one app to manage their condition. Digital solutions have become integrated into many parts of healthcare and by leveraging digital solutions pharma companies can tap into these increasingly health-aware consumers.

Deloitte notes that to move toward a patient-centric approach, pharmaceutical companies need to collaborate and coordinate among cross-functional teams. They must also adopt a more forward-thinking approach and willingness to try new methods to attract the kind of digital talent required to support a

patient-centric approach. Recommended approaches to improve patient centricity include partnering to support digital solutions, such as patient portals, automating processes that support patient-centric initiatives, deploying digital health technology and analytics, and building collaborative relationships with all healthcare stakeholders to improve health and digital literacy.

There is also potential to leverage disruptive technologies as well as novel ideas and partnerships to improve patient engagement. According to Deloitte, some of these approaches include:

- The use of blockchain technology to improve efficiency, safety, and traceability
- Gamification for better patient engagement and to improve health literacy and adherence
- 3D printing to transform the pharma value chain
- True partnerships with patients to have them manage their own healthcare
- Work with nontraditional partners to make the most of disruptive technologies and customer engagement
- Adopt distributed research networks and web-enabled virtual trials

One of the biggest challenges will be to overcome lack of trust in the industry, with only 32% trusting apps developed by pharma, according to a Deloitte survey and only 30% indicating they would be willing to share their data with a pharma company.

However, according to one survey, 75% of online consumers who use patient support programs provided by pharma companies feel confident that the therapy they are taking is right for them or for those they care for. Such programs need to go beyond strategies to improve adherence — a strategy that has been dubbed “beyond the pill” — to encompass issues such as disease and therapy awareness, understanding diagnoses, getting started on a therapy, improving medication access, and general patient support.

Among the programs that patients believe deliver the greatest value are: benefit cover-

Barriers to a Digitally Focused Patient-Centric Approach

- Uncertainty over regulators' expectations and requirements
- Data safety and privacy with rise of medical apps and other digital technologies
- Trust issues, resulting in patients being unwilling to engage with pharma
- Attracting the right talent to support a patient-centric ecosystem
- Low levels of health and digital literacy affecting ability to engage with patients effectively
- Traditional product-based culture vs. an agile patient-centric approach

Source: Pharma and the connected patient, Deloitte

age and access support, health coach/counselor, adherence program management, copay assistance, remote monitoring, affordability and reimbursement support, nursing support services, incentive programs, medication support, and patient outreach, reminders and scheduling.

Digitally Progressive Pharma

A growing number of pharmaceutical companies are starting to commit to a patient-centric, beyond-the-pill strategy to help patients achieve better health outcomes. According to AstraZeneca, patient-centricity is defined as “putting the patient first in an open and sustained engagement of the patient to respectfully and compassionately achieve the best possible experience and outcome for that person and their family.” The company has

(c) PharmaLinx LLC. Rights do not include promotional use. For distribution or printing rights, contact mwals@pharmavoices.com

implemented a companywide patient-centered research approach — from study planning by including patient insight in protocol development, to study delivery through patient engagement, and post study by keeping patients informed on access and future research opportunities. An important element of AstraZeneca's patient-centric program is a five-year research alliance with PatientsLikeMe to

gather patient data and patient opinion with a view to shaping R&D.

Another company that has embraced a patient-centric approach is LEO Pharma, which created LEO Innovation Lab with the objective of developing digital solutions for patients. For example, the company has focused on developing apps that provide resources to patients with skin diseases, such as dietary advice,

beauty tips, and how to engage with their healthcare professionals.

LEO worked with anthropologists to help understand the needs of psoriasis patients, which resulted in the development of a new treatment applicator.

Several other companies are getting patients involved in various aspects of the drug development process. During an EyeFor-

EXECUTIVE VIEWPOINTS



Kate Perry, PsychD
Director of Behavioral
Science, Atlantis
Healthcare

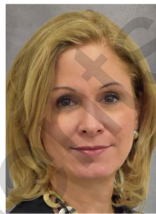
Delivering Better Patient Care

By applying health psychology frameworks, we can use technology to deliver a truly personalized support experience for each patient. We already know that people with the same diagnosis and on the same prescription can have completely different beliefs about their illness and treatment. Trained health psychology experts can leverage digital tools to identify and address individual barriers and challenges. This allows us to use technology to deliver a personalized healthcare solution that is relevant and effective for each patient.

Creating a Two-Way Dialogue

The quality of patient-HCP communication is a significant factor that can impact treatment adherence. Improving this dialogue is a key imperative for pharma. Traditionally, doctors were positioned as the experts, and patients were expected to passively receive and follow their instructions. Today, we realize the importance of a shared two-way dialogue. Doctors

remain the experts in the discipline of medicine, but patients are now recognized as active participants in their health, and are positioned as experts in the experience of their condition. Thus, pharma are increasingly investing in tools that help foster collaborative communication that can bring these two expert perspectives together.



Tara Herington
VP, Cardinal Health
Sonexus Access and
Patient Support

Partnering and Technology

Providing greater transparency around safety, pricing, and patient outcomes to healthcare providers is one key way pharmaceutical companies can be seen as partners, as well as by collaborating with HCPs to address challenges associated with payers and reimbursement. Data-based technology platforms can help deliver insights on where patients are in their treatment journey, and allow for proactive outreach at critical junctures when they are at risk of falling off therapy. It also can enable targeted interventions and messaging to patients through their preferred communications channels, whether it be phone, email, chat, or text.

Outcomes-Based Reimbursement

As more high-value precision medicines come to market, we will see more outcomes-based reimbursement contracts, resulting in an expectation that pharma manufacturers will increasingly have "skin in the game." At the same time, payers will continue to expect patients to take more responsibility for the cost of their treatment with high deductible insurance plans and co-pay accumulator programs that prevent patients from applying copay assistance payments to their deductibles.



Karin Beckstrom
Senior Product
Manager, ERT

AI and Clinical Support

Artificial Intelligence (AI) will find its place in the realm of patient engagement, especially as the use of smart speakers — like Amazon's Alexa — are being explored for use in clinical development. Not only can these devices improve the collection of important patient data during clinical trials, but they can serve as easily usable tools that remind patients to take medications and go to doctor's visits, and provide ▶

EXECUTIVE VIEWPOINTS

natural language answers to patients' questions about health management, diagnoses, and treatment options.



Gavin Birchnall
Director, Digital Patient,
ERT

True Partners

By leveraging new technologies, social media networks, and other digital tools, pharma is connecting with patients in ways never imagined 20 years ago. The next step is to approach new product development and ongoing patient support with a goal of understanding, recognizing, and solving patients' real problems in order to become true partners in improving patients' health.



Lauren Lawhon
Chief Operating Officer,
Health Union

Listening is Essential

A true partner recognizes that listening is just as important as talking — and acts accordingly. Listening is essential to

establishing trust, a necessary foundation for building and maintaining relationships. Listening enables partners to understand people's needs and motivations, so you can speak a common language. To be viewed as a partner in health, companies must demonstrate an understanding of how their therapy fits into people's lives — not vice-versa — and the value it brings.

Shared Decision-Making

Shared decision-making is already transforming the industry by helping patients feel more in control of their treatment and in-step with their healthcare providers. It also allows physicians to understand the importance of listening to patients, communicate more effectively at every step in the patient journey, and integrate quality of life concerns into treatment decisions. We are only starting to realize the true benefits of shared-decision making approaches in healthcare.



Liz O'Neil
SeniorVP, Channel
Strategy and Research,
Ogilvy CommonHealth
Worldwide, a WPP Health
& Wellness company

Self-Care and Technology

We live in an on-demand world where technology enables us to automate,

track, and move the mental load onto technology. Whether it's reminders on our phone, asking Alexa to lock the door, or a skin sensor that tells you it's time to reapply your sunscreen, there's an opportunity for self-care and healthcare to intertwine. Patients are getting used to convenience and intuitive technology, which if done right in healthcare will help nudge us all to healthier lives.



Marshall Rovner, M.D.
Medical Director,
Ogilvy CommonHealth
Worldwide, a WPP
Health & Wellness
Company

Integrated Patient-Collected Data

Physicians feel disengaged from their patients due to increasing documentation requirements in electronic health records. Pharmaceutical companies have an opportunity to partner with healthcare networks, physicians, and software companies to integrate data from digital tools such as wellness apps. Integrated patient-collected data can restore the physician-patient relationship across wellness and illness by championing patients as captains of their health, and powering physicians' clinical decision-making based on real-time data.

Pharma event in late 2016, Syneos Communications picked several leaders in the area, including BMS with its universal patient language project to change the way the company talks to patients and caregivers; Janssen's approach to giving patient an equal voice in the trial design; UCB's CIMplicity Right Start program, which supports new patients with timely information and answers; and

Abbott's VertiGO app to help patients with vertigo with simple exercises to reduce their symptoms.

In this more patient-centric environment, more and more parts of the business are becoming involved in such initiatives. While marketing is typically the major driver of such programs, the medical affairs function is increasing its role in patient-centric programs

and today is involved in 65% of these initiatives. Other functions that are involved in such programs are legal departments and regulatory affairs, according to a Cutting Edge study.

Patient-centric solutions, strategies, and programs vary from company to company, and some have yet to truly embrace such an approach, but for those that do, there is much to gain. **PV**

(c) PharmaLinx LLC. Rights do not include promotional use. For distribution or printing rights, contact mwals@pharmavoices.com

Be
thought-
provoking.

Be here.

Pharma **VOICE**

THE FORUM FOR THE INDUSTRY EXECUTIVE