

Engaged Patients Driving the Solutions Market

► Across healthcare, there is a growing move toward patient engagement and patient-centered care.

Technology and services companies in the healthcare space are more keenly focused on patient-centric initiatives and solutions as the healthcare model shifts from fee-for-service to value-based care. In fact, the global patient engagement solutions market is expected to reach \$32.2 billion by 2023, according to analysts.

The drivers for this growing market include the increasing prevalence of chronic conditions, programs aimed at keeping patients healthy, pressures to drive down costs and improve efficiencies, as well as greater patient awareness.

Changing Strategies

Putting patients at the center of solutions, tools, and programs is impacting pharma strategies from the bench to the boardroom. According to a recent survey, pharma functions taking the lead in patient-centric initiatives include marketing, the brand team, legal/regulatory affairs, and medical affairs. For brand teams, patient-centric is an important aspect of lifecycle management of the product. Legal and regulatory affairs need to play a key role in patient-centric solutions and programs to ensure issues such as patient privacy are safeguarded. And the medical affairs function plays a key role in educational and other medically focused materials.

To capitalize on a people- or patient-first model, companies will need to develop solutions that meet patient and caregiver expectations, as well as adjust their organizational operations. According to Deloitte, patients and caregivers now expect solutions that are coordinated, convenient, accessible, and customized to each user's needs. This is even more important given the growing number of non-traditional companies that have entered the healthcare arena, offering solutions that disrupt business as usual and give patients what they want: instant feedback, convenience, and a more consumer-centric experience.

In healthcare, that means an easy online experience and digital technologies to connect

with their healthcare providers. Real-time feedback is made possible through texts, kiosks, and smart speakers such as Google Home. AI is expected to have a huge impact in healthcare by improving patient outcomes, reducing cost, and cutting the number of unnecessary procedures by ensuring practitioners have the latest insights from multiple sources. Cognitive systems will soon be able to quickly identify and diagnose illnesses, ensuring better, more accurate care of patients.

Health informatics will be a key driver in healthcare solutions, making it possible to digitize data and automate processes and potentially give patients their data in a single app.

Where Patient Solutions are Being Deployed

In life sciences, patient solutions are having an impact across various parts of the business.

In clinical trials, for example, wearable monitoring devices and the use of smartphones to transmit patient data are enabling virtual trials.

Artificial intelligence offers the potential for patient solutions, such as advancing the understanding of the cause of disease, as well as adverse events.

Digital therapeutics, such as connected monitors to manage blood sugar, have the potential to improve disease management. They are also being used to treat mental health issues, such as addiction, using a number of strategies such as digital therapists and gamification.

In oncology, AI is being used to build a patient-specific treatment plan based on the patient's own data as well as relevant studies. By bringing together data from sensors, devices and other technologies, pharma companies can devise holistic, personalized care solutions for patients.

Patients are increasingly looking for support to help them through their healthcare journey. To help patients with rare diseases get the support they need, Shire — now part of Takeda — worked with a partner to

build a mobile app — the OnePath Patient Portal and Mobile Application — to connect patients to valuable resources, including its patient services program. Patients can use the app for support across their journey, including connecting with case managers, tracking insurance and provider information, getting financial support, and learning how to manage their own day-to-day treatment and care.

Health and fitness apps are increasingly being used by patients to monitor their well-being. Another patient solution that has the potential to inform treatment is the use of sensor technology for self-managed testing, for example for fertility or allergies. To do this, companies can leverage simpler apps that many consumers have in their homes, such as video game cameras. Sensors can also be leveraged to monitor a number of other health issues, such as stress and epilepsy. Sensors are already being fairly widely used to monitor patients with type 2 diabetes by automating the measurement of glucose.

Novartis is another company that has invested in the development of digital patient solutions, working collaboratively with technology leaders to develop, among other things, a wireless enabled asthma inhaler and several telehealth monitoring solutions for patients on heart medications.

Patient solutions are being leveraged by some companies to prepare patients for treatments and surgeries. For example, Johnson & Johnson has partnered with Wellness Solutions to create a smart digital platform to prepare for surgery and provides personalized care based on the patient's changing needs. Three tools include: a website to give patients the resources they need before surgery; a mobile app that guides patients before and after surgery; and a portal for interaction between the patient and their care teams. By engaging patients and helping them to understand the process, the objective is to help them stick to their care plan and return to good health sooner.

The opportunities presented by advanced digital patient solutions are increasingly being recognized by life-sciences companies, and a

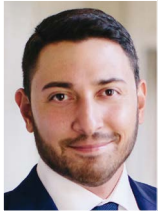
growing number are building their talent pool to further advance these objectives.

Examples include the appointment of an IT patient solutions engineering business analyst at UCB in Belgium, to focus on the design and development of patient-centric solutions.

To take advantage of new digital patient solutions and other innovations, life-sciences companies will need to ensure they have a broad range of talent, including information experts who bring expertise from other industries.

Merck's first chief digital and information officer, for example, comes from a background in consumer products, rather than the life sciences. These are the types of experts who will be needed to take patient solution innovation to the next level. **PV**

EXECUTIVE VIEWPOINTS



Hoss Sooudi

General Manager
EngagedMedia

Deliver Value

It's simple: pharma brands should focus on using technology to deliver value to patients. We've been doing it for almost a decade under the guise of achieving a measurable lift for our clients, but here's our secret: we do both, but we start with patients. By using the most advanced mobile technology in pharma to help patients, our clients always help themselves too. In our niche, the key is realizing that the "product-sell" is a byproduct of patient success.

Mobile Engagement

Mobile engagement has already transformed the industry over the last decade — ask me how I know — but by no means is it finished. Mobile will continue to change it in much more comprehensive ways. Pharma has only just begun to tap the utility for mobile engagement, not to mention how other areas should and will be radically changed, real-world evidence, for one. That said, other more nascent trends such as voice, ML/AI, and AR/VR will be the future and likely in the order of retail consumer adoption.

Olivier Chateau

Co-Founder and CEO
Health Union



Becoming a Partner in Health

To become a better partner in health, pharma companies can continue to invest in peer-to-peer programs that allow people living with chronic health conditions to connect with others and find the resources they seek. They can actively and transparently communicate how and why they developed a certain solution and how that solution addresses patients' needs. And they should find ways, such as partnering with online health communities, to show they support patients' emotional needs. ▶

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► Simple Technology Solutions

Pharma companies should aim to develop simple solutions using technology and tools that already exist, such as the iPhone or Apple Watch, allowing patients to receive immediate feedback. The more pharma companies can integrate a solution with tools patients already use, the more likely it will be successful. Additionally, with any tech-based solution, it's important to build and maintain a trust contract, by clearly disclosing what data people are sharing and why.



Gretchen Goller
Global Head, Patient
Recruitment and
Retention Solutions
ICON

Social Media Outreach

Digital technologies have enabled us to communicate more directly and effectively with patients. Through social media channels and targeted digital disease awareness campaigns, we are now able to amplify outreach to a larger population and offer clinical trials as a healthcare option to more patients.

The Patient Perspective

Patient centrality will continue to be a buzzword because although patient safety has always been at the center of drug development, their perspective and opinion has not always been at the forefront. However, this is changing and is the key to patient engagement. True patient centrality lies in embedding the patient perspective by understanding the needs, fears, attitudes, and cultural nuances of every given patient population and developing a customized plan that addresses those factors throughout the patient journey.



Peter Von Bartheld
VP, Customer Experience
Ogilvy Health

Patient Partners

Companies have the opportunity to partner with patients on their overall health journey. In addition to providing information about a specific disease state and how their product or device can benefit the patient, companies can also offer add-on advice about how meditation, nutrition, and exercise can, in many cases, play a vital role in helping patients achieve better health outcomes.



Michael Zilligen
Market Access Practice
Lead
Ogilvy Health

Streamlining Access to the First Dose

Access to appropriate treatment is impacted by numerous factors, including payer reimbursement, product affordability, and perceived stakeholder value to new and emerging therapies. Leveraging technology within the EHR, by automating the benefit investigation (BI)/verification (BV), prior authorization (PA), and patient assistance program (PAP) enrollment form will streamline access to the first dose. A sophisticated technology driven PAP reduces the time from prescription to product initiation, providing an enhanced customer experience and potentially improve outcomes — a win/win for patients, providers, and payers.



Kathleen Bonetti
Executive VP Marketing
Rx EDGE Media
Network

Personalizing Educational Content

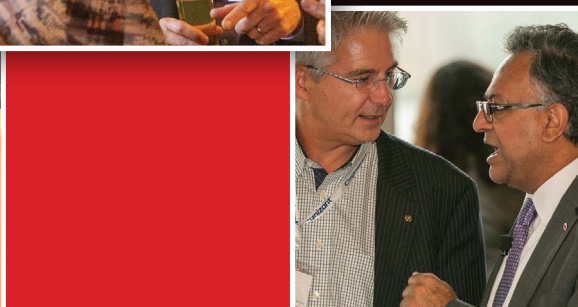
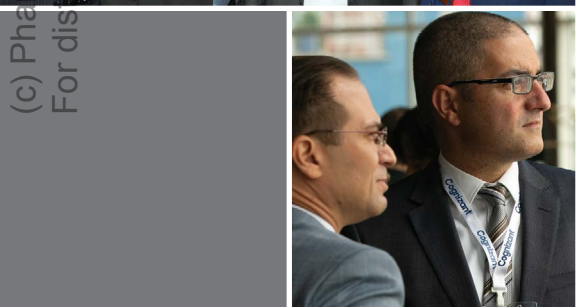
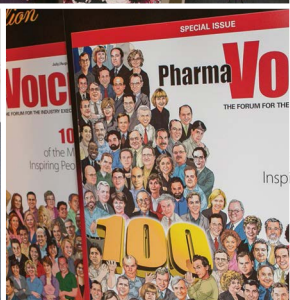
As part of a recent research project, we spoke to several healthcare providers to get their input on patient marketing and technology trends. One of the clearest takeaways from our research is that physicians are increasingly seeking to remove barriers, not necessarily add more “gizmos” to the healthcare experience. They are looking to the pharma community to provide more personalized, educational content that will help drive meaningful dialogue with their patients, particularly those with chronic conditions.



Nate Lucht
President and CEO
Rx EDGE Media
Network

Making a Difference in Patients' Lives

Most pharma companies are very good at explaining what their products do — from reducing the risk of blood clots to controlling A1C. These same companies are also skilled at describing how their products work, complete with videos and animations. However, to be seen as partners in health rather than purveyors of medicine, they need to focus on why their products will make a difference in a patient's life. The goal should be to educate patients and providers and also inspire them.



Pharma**VOICE**
100

Celebration

Against the backdrop of New York City's elegant Lighthouse at Chelsea Piers, the fifth annual **PharmaVOICE 100 Celebration** brought together inspirational and influential leaders from across all sectors of the life-sciences industry. A record number of honorees and attendees shared ideas, insights, and business perspectives, while enjoying the opportunity to expand personal and professional networks.

If you missed it, don't forget to join us next year at the sixth annual **PharmaVOICE 100 Celebration** on September 10, 2020.