Power SURGE

E-Solutions ranging from mobile advances to EMR technologies are expected to reframe the patient model.

Notably, the most encouraging news on mobile and quantified health is the recent announcement and launch of the HealthKit platform and the mobile app Health by Apple. HealthKit allows devices and apps to supply health data to a central store, and users can then retrieve their own and others' data when needed. The developers in this case can be manufacturers, payers, and hospital systems. Google has also announced a similar platform called GoogleFit. Between Apple's iOS and Google's Android mobile platform, a massive population can be activated for better health management.

This provides an opportunity for healthcare marketers to augment their digital and mobile strategies and integrate with the Apple and Google platforms.

Pharma companies, say experts, should be looking to integrate a service layer in apps that alerts healthcare practitioners, including nurses, in real time and trigger a meaningful patient interaction at the moment of need.

Experts also say the platform could also enable the sharing of data between payers and manufacturers to build robust pharmacoeconomics for drug therapy with real-time data. The ideas on what's possible are really left to the imagination. In the end, user privacy and how the population chooses to share its health information and with whom will dictate what's actually possible.

"There is a perfect storm of new technologies, like pervasive computing, artificial intelligence, electronic health records, and wearable and ambient biosensors that are poised to change the way clinical trials are conducted," says Julian Jenkins, VP, project planning and management in R&D projects, clinical platforms, and sciences at GSK. "They present an opportunity to allow physicians, patients, and research sponsors to track patients in real time, allowing for deeper understanding of diseases and treatments, more interaction with the patient and the measurement of outcomes im-

portant to patients. Harnessing these opportunities in a coordinated way will be a competitive advantage, and will benefit patients in need of new treatments."

Social Media

According to PwC HRI's consumer survey of 1,060 U.S. adults, about one-third of consumers are using social media for health-related matters. Additionally, one-third of consumers would be comfortable having their social media conversations monitored if the data could help identify ways to improve their health, although most lack complete patient profiles. Therefore, pharma companies should move beyond social media for marketing and also use it to improve clinical trial recruitment. Pharma should also mine social media for product or company complaints and respond by inviting consumers to an offline conversation, says Larry Gioia, director, IT strategy and enterprise architecture, PwC.

"Pharma companies should be driving toward the '360 View of the Patient' data strategies — aggregating patient perceptions, knowledge, and the behaviors that influence health could complete these profiles, and such information can be gleaned by properly integrating social media data resulting in evidence that's created," Mr. Gioia says.

Pharma companies wanting to take advantage of patient-reported data must proceed with transparency and the proper individual permissions.

"If pharma companies are going to succeed, they need to think of social as a mindset and not just another channel," he says.

"Social media is at the heart of 21st century patient engagement, and patient engagement is what pharma companies strive to do," says Lisa Stockman, president, global PR/medical communications, inVentiv Health.

This is demonstrated in a patient survey that Ms. Stockman conducted last year with Inspire, an organization that works with pa-

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Telehealth in the Next Five Years

The 2014 Frost & Sullivan Pulse of Telehealth survey, done in conjunction with the American Telemedicine Association meeting this past May, collected opinions on the state of the market from 95 industry stakeholders, including technology vendors, healthcare providers, and industry consultants. The market for telehealth is expanding at a rapid pace as the practice of remotely provided clinical services becomes entrenched in every aspect of healthcare in North America. The use of telehealth will be an increasingly important component to health system transformation in the coming years.

Top line findings of the survey include:

Telehealth Markets with Highest Impact Over Next 5 Years
» Remote Patient Monitoring
» Video telemedicine
» mHealth

Therapeutic Areas with Most Opportunities for 2014
» Mental Health
» Diabetes
» Cardiovascular Disease

Leading Reasons for Telehealth Adoption
» Access to Care
» Improved Patient Outcomes
» Cost Savings

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VIEWPOINTS

TIM DAVIS
CEO and Founder
Exco InTouch

Opportunities and Challenges

E-Solutions provide enormous opportunity to enhance traditional processes. Consider electronic health records (EHRs), when fully integrated, EHRs offer improved quality and convenience of care, increased engaging patient participation and more accurate diagnoses whilst driving efficiencies and better health outcomes. To realize these benefits it is critical that patient data remains secure at all integration points. With more integration, more transparency and control is required to ensure both patients and stakeholders are fully aware of data transitions.

Wearble Technologies

Wearable consumer technology is set to have a huge impact in both general healthcare and clinical research. These devices are already being integrated into mobile health solutions to provide a comprehensive view of patient well-being and now in clinical research activity trackers and calorie counters provide valuable secondary end point data points. Further significant advances and adoption will follow as companies, health providers and insurers seek new ways to quash rising medical costs.

RICK VAUGHN
Director, Instinctive Data,
powered by MDOL

Have Trust in the Experts

Trust the experts. I say this not because we are omniscient, but because we have gained the experience to know how to avoid pitfalls and maximize impact. That is, we made some mistakes at the outset, and learned from them. In the past, I was often asked by a brand manager to shoehorn an existing campaign into our eSolution vehicle, but that never worked as well as tailoring the vehicle to the material and leveraging our subject matter expertise.

Connecting with the Right Provider

Don't focus on the numbers too much. Healthcare technology companies may be fragmented now, but market conditions make them ripe for consolidation. Although no one company offers every target physician, you can make a significant impact with your brand among the HCPs you can reach. This can still yield a high return on investment with meaningful scale. More important, you will have learnings from pilot programs to leverage as the industry consolidates. We are all eagerly watching this evolution.

ROB ROBERTSON
President and CEO
MedNet Solutions

eClinical for Every Study

eClinical technologies have now advanced to the point where they truly make business and financial sense for any and all research initiatives, regardless of how small or short in duration they may be. Cloud-based technology platforms are not only much more affordable than their predecessors, but can deliver a level of configurability and connectivity that was not possible just a few short years ago. Systems can now be set up and deployed very quickly by a CRO's or sponsor's own clinical research team. The results are faster trials, cleaner data and lower costs than ever before.

MATT BALOGH
Senior VP, Chief Technology Officer, Ogilvy CommonHealth, part of Ogilvy CommonHealth Worldwide

Personalizing The User Experience

Digital leverages data to personalize and think about user experiences, compared to traditional which starts with an idea and then tests it in-market. Both leverage data, but they go about it in opposing ways, making integration difficult. It's better to start with a process that measures and integrates all channels from the very beginning. Traditional and digital can be aligned, but it takes some real planning to make it work seamlessly.

BUDDY SCALERA
Senior VP, Multichannel Content Strategy, Ogilvy CommonHealth, part of Ogilvy CommonHealth Worldwide

Digital Provides Real-Time Data

Digital gives you useful data almost immediately. You don't have to wait a month or longer to get data and run a report. You can be making adjustments in real time that save you time and money, while increasing impact.

PETER DUSSIAS
Executive Director, Integrated Channel Management Services, Commercial Solutions, Quintiles

Optimizing the Promotional Spend

There's a huge opportunity to dynamically optimize promotional spend on e-solutions at the individual physician level using channel receptivity data. E-solutions generate behavioral data that allow one to optimize communications. Preferences can be derived in real time by measuring and weighting physician channel receptivity based on response or non-response to a particular channel and message. The result is deployment of the right resource and channel mix where and when needed. However, traditional processes pose hurdles as well such as: diverse stakeholders and players often with

VIEWPOINTS

competing interests, a range of technology platforms and analytics across several channels, and general risk aversion to new models.

Virtualizing Reality

Key advances seen include greater use of remote live platforms integrated with field sales teams. For example, virtual representatives equipped with a range of digital tools to engage with a variety of stakeholders, for example HCPs and patients. The field sales team remains the most critical channel in an integrated campaign. Field sales resources can be used with e-solutions, with the sales rep as the quarterback. The field team delivers core product messages and drives targets to digital content, which may be accessed via a personalized URL, for example. By using an integrated campaign management system, the impact of the sales team and multichannel promotion can then be measured on a weekly basis to determine the optimal resource allocation and ultimately leads to dynamic call planning where the field sales rep call schedule and messaging is coordinated with the timing and content of multichannel tactics required to deliver an impactful communication strategy. Over time, a customer master file can be built, including details of channel mix preferences, representing a valuable resource for planning launches and expanded indications.

JEREMY SHUBERT
Chief Information Officer, Triplefin

Customer Advocates

When integrating e-solutions within traditional processes, the biggest opportunities are found in delivering viable solutions that could benefit all stakeholders in the healthcare chain, thus creating strong customers and advocates at the same time. If solutions are delivered that streamline the workflow of HCPs, minimize disgruntled pharmacy customers, and drive patient adherence, then everyone wins. The challenges continue to be disparate systems across stakeholders and a reluctance to change. The system needs better patient-centric system integration.

Supporting the Patient Journey

Companies have the opportunity to build direct relationships with patients to support their patient journey. There are many ways to connect with patients and influence behavior using e-solutions that are tailored to a patient's individual preference. By examining the critical points and finding the optimal ways to reach patients, it can really personalize the relationship, which creates a customer for life.

tient advocacy groups to build and operate online health and wellness communities. The study, as yet unpublished, showed that a valuable use of social media is online patient communities. In fact, 92% of patients reported that social networking with other patients helped them better manage their condition. It also facilitated a strong physician-patient partnership, which is known to support better outcomes. Most people surveyed (78%) reported that joining Inspire helped them better relate to their doctor. The majority also directly attributed improvements in their health condition to their participation on Inspire. Given all the factors involved in managing or recovering from a health condition (e.g., physician expertise and bedside manner, availability of effective treatments, adherence to treatments, access to care), the robust effects of participating on an online patient community were profound.

"If these effects hold across platforms, online social networking sites could even be a way to lower medical costs — participation, after all, is free," Ms. Stockman says.

Virtualizing the Clinic

Sensors will be used to measure effects of drug therapy and to monitor adherence, and clinical trials will become more virtual, or even completely virtual. As such, research and development will take place with the patient in mind from the outset, including them in the development of research protocols and identifying their unmet needs. And perhaps most importantly, digital disruption will allow life sciences companies to change how they connect with patients, and even to build a relationship with patients.

These types of technologies are creating a

profound impact on clinical trials, says Michael Russo, senior director, corporate digital strategy and innovation, Acorda Therapeutics.

"Digital tools and social media are a very cost-effective solution to help speed recruitment, which can cut down on development timelines and is especially critical for smaller companies with limited funding."

"Social, mobile, analytics, and cloud technologies are driving innovation in business models, product innovation, patient and provider engagement, and the way employees and partner stakeholders collaborate within an enterprise," says Shankar Narayanan, VP, global head, life sciences business unit (markets) at Cognizant.

According to Mr. Narayanan, such collaborations include TransCelerate BioPharma, a collaboration of 19 pharmaceutical companies. The consortium is transforming the way clinical sites collaborate with pharmaceutical companies on clinical trials by building a subscription-based shared investigator platform intended to be an industry utility for life sciences.

Pharma companies are partnering with technology companies to create solutions that deliver health data in real time. For example, Otsuka and Novartis have studies under way in hypertension and heart disease and are innovating with next-generation drugs and prescription pills by incorporating novel ingestible sensor-based technologies from Proteus Health. A pill with a tiny sensor embedded inside sends vital health information — once ingested — to a smartphone. One can monitor a patient's heart rate, activity and rest patterns, and transmit this data wirelessly via Bluetooth to a smartphone app, allowing doctors and caregivers to better tailor care to a patient with chronic illness.

This wealth of health data points for patients and their physicians will not have any positive effect on health and behaviors unless the data are shared in a useable format, adds Mr. Russo from Acorda Therapeutics.

"Innovative companies are coming up with ways to pull out trends from the data and automating how it's shared with patients and their physicians," he says. "As wearable technologies become more mainstream, we'll have access to larger pools of data and the need to share that data in a useable, efficient way will become even more important if we're to realize the full potential of access to this information." **PV**
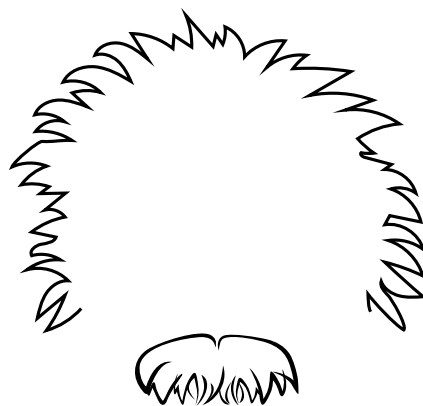
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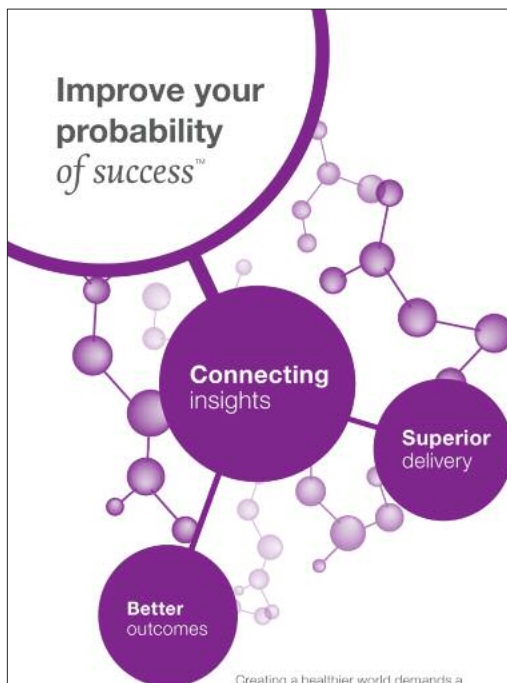
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