



mHealth: Pharma's Next BLOCKBUSTER

In just a few years, the pharmaceutical industry will be able to reach one in every five citizens on Earth on their smartphone.

The practice of mobile health, or mHealth as it is now known, has been around for decades. The first initiatives were designed to provide greater health-care access to remote populations, mostly in developing countries. This trend continues and grows daily, providing many patients with a higher quality of healthcare and health education than ever before. There are now multiple science and commercial applications to mHealth, including capturing data and tracking patients during clinical trials, collecting disease information, defining patterns, and sharing research for quicker and more effective collaboration on healthcare solutions. Other mHealth solutions include health literacy initiatives, anti-counterfeit tools, and professional education.

At a commercial level, the focus has moved to more consumer-centric compliance and adherence applications. Studies prove these technologies can benefit almost everyone.

According to a report by research2guidance,

by 2015 one in five people around the world will have a smartphone, which will enable the industry to deliver health and wellness support via what some researchers call “mass personalization.” From cost savings to data collection to better health outcomes, mobile apps may be the industry’s answer to the next blockbuster.

The experts participating in this forum are deeply immersed in mHealth at different points along the healthcare spectrum, and they are providing strategies, best practices, and a wealth of information pertaining specifically to the mobile application movement. With pharmaceutical company investment in mobile phone apps and educational websites up 78%, this seems the hot spot for discussion.

Pharma Needs to Move Now to Mobile Apps

1. 5 billion cellphone users worldwide
2. Increased use of smartphones for Web information
3. Create value beyond the pill

DR. PAUL KECKLEY. DELOITTE. mHealth is a catalyst to fundamentally change the way

drugs are evaluated and delivered to patients. The landscape is dynamic, so staying abreast of emergent platforms, applications, and devices is essential. Cloud computing promises the ability to share larger amounts of clinical data, thus changing the way pharma might conceive its postmarket surveillance activities.

CHRIS WASDEN. PWC. Most of the incremental value companies can create is through information. mHealth will become one of the most effective tools the industry can use to share, gather, and monetize information to create value beyond the pill. There are apps that can increase patient compliance. There are apps that provide education for patients. There are apps that enable patients to engage with one another via social networks; patients who suffer from the same disease or conditions can learn from one another’s experience. Apps and devices that can integrate collected patient data around various medical situations with treatment information can become part of therapy and health management.

XAVIER PETIT. SHIRE. There are opportunities with mobile apps, coupons, and adherence programs in the consumer space. With HCPs, the basics are mobile site optimization to ensure an adequate user experience and the delivery of the right information at the right time on the right device. Additionally, with the significant adoption of smartphones and tablets

by the healthcare community, in 2011 I expect a sharp increase in the adoption of e-prescribing, e-sampling, e-detailing, and EHR/EMR usage. Other ripe opportunities include partnering with third-party aggregators, such as WebMD and Epocrates, to leverage their platforms and build up ready access.

OLIVIER ZITOUN. EVEO. The time to go mobile is now. Brands need to use mobile technologies to reach healthcare providers, help patients, and to aid sales forces. With 5 billion mobile users in the world and only 6,000 medical apps in the store, the potential to reach targets with robust, relevant, interactive programs is tremendous. But developing a regulated mobile device application for a pharmaceutical company is a big challenge. One of the most important steps is to diligently outline the process. Mobile projects are complex and come with numerous unknown variables. Developing a mobile application is actually developing software, most people don't realize there is a lot of work to do after launch. Apps must be continually evaluated and refined. The launch is just the beginning. Managing privacy, compliance, and regulatory issues are also difficult. If the app program is international, it is important to understand the differ-

ent laws and regulations in different countries.

DAVID TOLIVER. ANGEL. Consumers as well as healthcare providers have become more voracious in their desire to consume medical information, and they expect that information to be at their fingertips no matter where they are. We've reached a tipping point in the mobile world where smartphones are starting to outsell traditional cellphones across the board. This means more people will have the ability to consume mobile information. Additionally, the pharmaceutical industry, from a historical standpoint, is starting to adopt mobile technologies faster than other technology roll-outs they've done in the past. If a pharmaceutical company isn't thinking mobile right now, it needs to head in that direction very soon.

Challenges in the mHealth Environment

1. The mobile market moves at the speed of sound
2. There are more than 300,000 mo-

“ Offering useful and functional information for the long term is key for mHealth solutions. ”

DR. KELLY CHOI / QuantiaMD



“ mHealth will be a huge part of the physician and patient education process and mobile tactics will need to integrate into the physician workflow or treatment process. ”

DAVE DUPLAY / MedTera



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KELLY CHOI, M.D. VP, Innovation and Customer Solutions, QuantiaMD, which delivers rich media content to a full range of mobile devices, including smartphones, tablets, and PCs. For more information, visit quantiamd.com. or e-mail kelly.choi@quantiaco.com.



CHRISTOPHER CULLMANN. Creative Director, Digital, Ogilvy CommonHealth Interactive Marketing, part of Ogilvy CommonHealth Worldwide, one of the largest healthcare communications networks. For more information, visit ogilvycommonhealth.com.



DAVE DUPLAY. Founder and President, MedTera, an integrated marketing solutions partner dedicated to improving education, promotion, and communications in the healthcare, life-sciences, and pharmaceutical industries. For more information, visit medterasolutions.com, or e-mail daved@medterasolutions.com.



PAUL H. KECKLEY, PH.D. Executive Director, Deloitte Center for Health Solutions, the health services research arm of Deloitte LLP. For more information, visit deloitte.com.



JOHN MAILLARD. Director, New Product Development and Syndication, e-Healthcare Solutions, a digital ad network specializing in the pharmaceutical vertical. For more information, visit e-healthcaresolutions.com.



KURT MUELLER. Chief Digital and Science Officer, Roska Healthcare Advertising, a full-service ad agency that integrates data and insight-driven marketing and advertising solutions. For more information, visit roskahealthcare.com.



JAMIE PECK. Managing Partner, Rosetta, an independent digital marketing agency. For more information, visit rosetta.com.



XAVIER PETIT. Senior Consultant, Integrated Marketing Multi-Channel Strategy Services, Shire US, a global specialty biopharmaceutical

company. For more information, visit shire.com. (Editor's Note: The insights expressed by Mr. Petit reflect his personal opinions and not those of his employer.)



VINCENT SCHIAVONE. Co-founder and Chairman, ListenLogic Health, a social media intelligence company. For more information, visit listenlogichealth.com, or e-mail vs@listenlogic.com.



DAVID TOLIVER. Senior Manager, Customer Acquisition Marketing, Angel, a subsidiary of MicroStrategy and a provider of on-demand IVR and call center solutions. For more information, visit angel.com.



C. PETER WAEGEMANN. VP, mHealth Initiative, a membership organization that envisions the emerging mHealth revolution. For more information, visit mobih.org.



CHRIS WASDEN. Managing Director, Strategy and Innovation, PwC, which provides industry-focused advisory services. For more information, visit pwc.com.



OLIVIER ZITOUN. CEO and Founder, Eveo, an independent digital healthcare agency. For more information, visit eveo.com, or e-mail media@eveo.com.



“ To successfully launch projects pharmaceutical companies should leverage what they know best: their audience. ”

CHRISTOPHER CULLMANN
Ogilvy CommonHealth



“ mHealth is the information highway for DTC. ”

DR. PAUL KECKLEY
Deloitte



“ Mobile apps will help the industry create value beyond the pill. ”

CHRIS WASDEN
PwC

bile apps to compete against

3. Users lose interest in apps fast

XAVIER PETIT. SHIRE. A critical factor in mHealth adoption is around the value it brings to various stakeholders. This means figuring out solutions that cater to everyone's needs — patients, healthcare providers, payers, and pharma — and providing a valued service to them. Cost savings and efficiencies are obvious drivers for the commercial side, but for patients, these might not be enough on their own as they will also look for convenience, customization, flexibility, and ease of use. For example, there are many reports of successful adherence programs run by hospitals for teens using SMS/texting. But these programs might not work with all audiences. This being said, mHealth and mobile adoption in general provide opportunities for pharma that come with

their fair share of challenges. For mobile-based solutions around health, mobile apps, or any software-based health data processing systems, there are issues such as understanding what defines a device and requirements for 501K clearance. Bradley Thompson wrote a good report on this in the 2010 MobileHealthNews “FDA Regulation of Mobile Health” report — which I strongly recommend everyone read.

CHRISTOPHER CULLMANN. OGILVY COMMONHEALTH. The rapid growth of the mobile market and the speed at which it is changing is a challenge for the pharmaceutical industry. Pharma companies, slowed by regulatory and legal restrictions, must still find a way to participate in a market that is shared with smaller and faster competition. To successfully launch projects, pharmaceutical companies should leverage what they know best: their audience. Being able to address the needs of its consumers is how a company will win its market. Looking at the end user's requirements and creating a model for usage are more important than ever. An mHealth solution for collecting emergency room data will have a completely different execution than a compliance application for a teen who has diabetes.

JAMIE PECK. ROSETTA. Any pharma marketer about to initiate an mHealth project needs to understand the sheer competitiveness of the landscape. There are currently almost 300,000 apps available for the iPhone, almost 50,000

Three Steps to That First Leap Into mHealth

mHealth is the future. The industry is at the beginning of everything that is possible. These first steps will help move a company beyond the start line.

- 1. Know the audience.** Stay close to how patients and HCPs are using mHealth to determine how to best leverage mHealth for business in a compliant manner.
- 2. Start small and smart.** Seek out credible partners in this space and do some pilot programs to learn and evolve. From a competitive standpoint, no one wants to be the last one to try a new technology. Marketers need to get smart on this space fairly quickly.
- 3. Catch up.** Assess how internal resources and processes need to evolve to support mHealth.

Source: Kelly Choi, QuantiaMD.
For more information, visit quantiamd.com.

apps for the Android, and several thousand apps for the Blackberry. Pharmaceutical marketers are competing against apps that count calories, that help with fitness, that provide recipes, etc. Understanding how to contribute something of value to the daily management of a patient's health will be critical to success.

VINCENT SCHIAVONE. LISTENLOGIC. Broad health applications will continue to have a big impact on the industry. The Carrot app is a great example of this; it's an all-in-one application to track all types of health and nutrition information. Compliance and adherence apps, being more narrowly focused, will have less impact in pharma. Only a small group of patients will download a single purpose app for compliance, for example; an even smaller subset will use it after 10 days. We'll likely see pharmaceutical brands tie up sponsorship and educational sections of the apps that manage to gain audience critical mass.

XAVIER PETIT. SHIRE. Pharma companies should evaluate their role in this market and how the technology complements treatments. It is very likely that the pioneers in mHealth will not be pharma companies; they will either become partners, competition to pharma, or be absorbed by pharma companies.

Best Practices for Implementing Mobile Apps

- 1. Achieve a complete understanding of the mHealth ecosystem**



“ Companies should not become enamored with new technology just for the sake of being in the game. ”

JOHN MAILLARD / e-Healthcare Solutions



“ Technology isn't a novel accessory, but should be thought of as an embedded part of the health management process. ”

KURT MUELLER
Roska Healthcare Advertising

- 2. Define objectives before beginning
- 3. Add value to the health experience

C. PETER WAEGERMANN. MHEALTH INITIATIVE. The first thing pharmaceutical companies need to understand is the difference between eHealth and mHealth — they are related, but are not the same. mHealth is not possible without eHealth. Companies need to familiarize themselves with both practices, as they are very complex. They need to know the differences between wireless health, telemedicine, connected health, eHealth, and participatory health. To understand these elements is to understand the future of communication-enhanced healthcare. I would not advise the industry to create an app without understanding the whole eHealth and mHealth ecosystem. The key for pharmaceutical companies is learning how to adjust to communication-enhanced healthcare.

XAVIER PETIT. SHIRE. The focus should be around adding value, improving processes, and addressing communication flow. It is key for pharma companies to listen to their patients and customers; to truly understand their needs, challenges, and expectations; and know where and how these needs can be met. It is equally important to understand that for any mHealth initiative to have long-term success it needs to be independent of any specific platform or technology. It is also important to identify the right challenges rather than implementing a technology that can solve a meaningless problem. Long term, it is likely that solutions will involve more than one platform or technology, they will need to integrate multiple factors or devices, they will need to accommodate multiple forms of interactions, and they will require the involvement of many stakeholders.

JOHN MAILLARD. E-HEALTHCARE SOLUTIONS. Companies need to identify the program goal

Pharma Spending on Mobile Apps and Websites

According to a recent report from Ernst & Young, pharmaceutical companies have increased their investments in mobile phone apps and educational websites by 78%. The apps and sites generally aim to encourage patients to take their medications, eat well, and exercise more often, according to the report. Merck and Novartis are the leaders in the mHealth drive. Pharmaceutical companies launched a total of 97 projects that made use of information technologies to improve patient health last year, compared with a total of 127 such projects during the previous four years combined.

Source: Ernst & Young. For more information, visit ey.com.

and determine if it is achievable through mHealth. They shouldn't become enamored with new innovations and technology just for the sake of being in the game. Mobile — for that matter any mHealth application — involves costs. Furthermore, the app has to make the proper first impression with the consumer/patient to have any chance of succeeding. Companies need to listen to every bit of feedback seriously; the user experience is every-

KURT MUELLER. ROSKA HEALTHCARE ADVERTISING. Before embarking on an mHealth project or selecting which mobile platform to use, companies should consider three key points to ensure an mHealth campaign's success. First, the business objectives need to be clearly de-

efined. Second, companies need to identify the tangible results they expect to achieve; knowing audience preferences, the type of media they consume, and the devices they use are critical to the success of the program. And third, define how to measure success against the objectives, determine what data are needed, and how to capture information.

DR. KELLY CHOI. QUANTIAMD. Mobile apps can be disposable, so understanding how a given solution will be used by a doctor or patient is key not only for adoption but for continued success. Offering information that is useful and functional for the long term is key for mHealth solutions. This understanding is obtained by monitoring the feedback of many physician users about their needs and what types of content work for them on the go. This will allow for rapid growth in the mobile space while continuing to actively retain and engage users.

DAVE DUPLAY. MEDTERA. If the goal is to educate physicians and patients to drive better clinical outcomes and enhance patient adherence, mHealth should be considered one tactic in the overall treatment or education strategy. The key is having all channels, including nondigital education, social media, and desktop applications, integrated into a lifelong learning platform.

What the Future of mHealth Holds for Pharma

- 1. A more holistic approach to marketing
- 2. Technology is here to stay
- 3. Better informed patients, better outcomes



“ Brands should be using mobile technology to reach physicians, patients, and to aid the sales force. ”

OLIVIER ZITOUN / Eveo



“ If a pharmaceutical company isn't thinking mobile right now, it soon will be. ”

DAVID TOLIVER / Angel



“ Mobile enablement should vastly improve health outcomes. ”

JAMIE PECK / Rosetta

mHealth Fast Facts

- » 88% of physicians said they would like their patients to be able to track and/or monitor their health at home, particularly their weight, blood sugar levels, and vital signs.
- » 57% of physicians said they would like to use remote devices to monitor patients outside of the hospital.
- » 31% of consumers said they would incorporate a mobile app to track and monitor personal health information.
- » 27% of consumers said they would find medication reminders sent via text to be helpful.

Source: PwC, Healthcare Unwired Report. For more information, visit pwc.com.

JAMIE PECK, ROSETTA. Since mHealth is about access, and not necessarily enablement, the industry needs to focus first and foremost on outcomes and the reporting of outcomes. Mobile enablement should vastly improve outcomes. The industry needs to focus on how to analyze and optimize data and programs.

DR. PAUL KECKLEY, DELOITTE. The industry must embrace a new vision of direct-to-consumer advertising that acknowledges the critical role consumer-directed, technology-enabled care management will play. mHealth is the information highway for DTC; it facilitates customization of information and the correlation of diagnostics and therapeutics. mHealth will be the centerpiece for future DTC efforts and a rifle rather than shotgun approach to its use must be thoughtfully designed by each company, which must carefully optimize interactions between consumers, prescribers, and payers.

C. PETER WAEGERMANN, MHEALTH INITIATIVE. The pharmaceutical industry will eventually move to a more holistic approach to health-care. The focus will move from only providing medications to providing applications, which have long-range implications. Instead of clinicians just prescribing pills, they will also prescribe mobile apps that provide guidance. It will be like using a GPS compared with paper maps — getting directions without knowing where you are. Pharma mobile apps will guide patients in the same way. It's a whole different ball game.

KURT MUELLER, ROSKA HEALTHCARE ADVERTISING. When establishing long-range goals around mHealth the industry needs to accept and understand that the boundary between real life and mobile life is disappearing. Think

about the way 20 year olds 'watch' television today. Thirteen minutes constitutes a complete show and they may just be watching on their iPhones. We are inextricably linked and dependent on technology. The pharmaceutical industry should establish its long-range goals with this understanding in mind and seek to integrate mHealth into the everyday fiber of patients' lives so they once again are simply managing their health. Technology must not be treated like a novel accessory, but as an embedded part of the health management process, one that achieves the best possible outcomes.

DAVE DUPLAY, MEDTERA. An educated patient or caregiver is a healthier, more compliant patient, so the focus must be on education. We recently conducted a patient survey in partnership with Dr. Mark Vanelli of the Harvard Medical School, and found that up to 72% of patients in their first month of treatment stop taking their prescribed medications. Pharmaceutical manufacturers sacrifice between 40 cents and \$2.34 of potential revenue for every dollar of current revenue because of the high rate of medication discontinuation. The patient education process needs to be engaging, fun, entertaining, and easy. mHealth has the potential to be a huge part of this educational process.

DAVID TOLIVER, ANGEL. Mobile devices will only expand throughout the market and within all demographics. Seniors are the demographic with the largest year-over-year growth in the mobile market. Creating a direct connection between company and customer, where that direct, always-on connection rests in the palm of the customer's hand, is extremely important. There has never been a time when marketers had the opportunity to make their brand or company information



“ mHealth does create opportunities for pharma companies, but it comes with a fair share of challenges. ”

XAVIER PETIT / Shire US

ever-present in front of their customers. Not only can mobile apps make a brand site the go-to source for the information consumers are hungry for, but mobility also affords a direct two-way connection. With smartphones, marketers have the ability to reach out to their customers via every mode of communication — phone call, SMS, e-mail, push notification, and more. And mHealth gives customers that same direct connection back to the brand. When establishing long-range goals, companies need to think about how to expand their customers' communication world. They don't have to do everything at once, of course, but they should get started.

CHRIS WASDEN. PWC. When developing a mobile app, a company can't be self-serving to its own drug. Patients want apps that solve their problems. This is a difficult concept for drug companies to get their arms wrapped around because they have always focused on selling product. However, some of the more innovative companies are starting to think along the lines that their No. 1 priority is the patient's overall health, and that the drug is just one of many parts of a holistic approach. The pharmaceutical industry needs to learn how to integrate a drug into a whole list of other requirements for a more holistic approach that drives value to the patient. Shire has a mobile app for patients with Gaucher's disease that can be used even if they are not taking the company's treatment. Another ex-



“ Compliance and adherence mobile applications will have a limited impact on the industry. ”

VINCENT SCHIAVONE / ListenLogic

ample is the first mobile app approved by the FDA called WellDoc. This app was developed to improve the management of diabetes and it is drug company agnostic.

JOHN MAILLARD. E-HEALTHCARE SOLUTIONS. The knowledge that there is someone else out there is a huge motivating factor for many people. The ability to share successes, challenges, and everything in between brings together health communities, which can be accessed regularly for more information and further support. This will guide the future direction of mHealth. Marketers will want people to remember that it was their company that gave them an application, which will increase brand loyalty while improving adherence.

OLIVIER ZITOUN. EVEO. The long-range goal should be centered around improving the patient-HCP interaction. Solutions that can bring together the patient and physician using real-time data will be important. Data would be stored seamlessly and historical information on patients could then be easily accessed, without the need for separate discussions, more paperwork, etc. ^{PV}

Shire: An mHealth Case Study



Shire

Shire's drug, VPRIV, for Type 1 Gaucher's disease was approved by the FDA in 2010; the drug is targeted to fewer than 5,000 patients in the United States who suffer from the incurable chronic genetic disease. This small and

well-informed community of patients, who receive biweekly infusions, cheered the news of a second drug.

Shire officials say the Gaucher community is a very vocal customer base; patients are fierce advocates because they went for so many years before a second treatment was approved.

For Shire, the business model for mHealth was one that empowered an already active patient community with a tool to manage various aspects of the disease.

The result was a robust app, called OnePath, which tracks patient health metrics, provides real-time information to physicians, and connects patients to dedicated case managers, who streamline insurance coverage issues. OnePath also includes news, calendars, and iGau, which helps patients track therapeutic goals.

iGau allows the patient to track bone pain, hemoglobin levels, liver volume, platelet count, and spleen volume. Patients can take this information to their regular doctor visits.

Many patients have been treated for years but don't have an easy way of recording their information. They will say, "Yes, I feel better," but the doctor wants to know what the actual results are.

According to Shire officials, because patients receive infusions every other week, the goal was to create an application that would empower them with information, allow them to communicate with the company more easily, and ultimately be able to communicate with their physicians.

Throughout development of the app, Shire reached out to the tight-knit Gaucher's community for advice.

Shire officials say they try to involve members of the patient community, whether in a formal test setting or an informal poll. The goal was to get patients to ultimately drive physician adoption of the OnePath app.

Shire's focus is to enhance the relationship between patients and their doctors, and it is currently developing a complementary physician app.

Source: PwC, Health Research Institute, Healthcare Unwired; New Business Models Delivering Care Anywhere. For more information, visit pwc.com/us/mhealth.



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Mobile Apps Will Impact Marketing Practices

The increased use of mobile apps and other devices that improve patient compliance may change the way the industry markets drugs.

Mobile applications that can help boost compliance levels and increase use are advantageous for all parties. Getting patients to take the medications prescribed by their physicians, at the proper dosage, and for the specified period of time, are tough challenges for doctors, insurers, and pharmaceutical companies.

Many in the healthcare industry are realizing the potential and opportunities that mobile solutions provide. If more mobile apps can lead to better compliance, which then leads to bet-

ter health outcomes, this swing could create a new marketing environment for the industry.

"We've only just scratched the surface on what these unique compliance programs are capable of," says Olivier Zitoun, CEO and founder of Eveo. "From a health perspective, patients compromise their treatment when they fail to follow their drug regimens. From a financial perspective, pharmaceutical companies are losing revenue in situations when they have already won the sale."

According to Xavier Petit, senior consultant, integrated marketing multichannel strategy

services at Shire, a good point of entry for pharma in the mobile sphere is through marketing.

"At this point it is less important for pharma to figure out what mHealth is than entering the field and learning how to deliver programs to consumers and customers, what processes and resources are needed, how mHealth integrates within the marketing mix, and what the operational requirements are, such as content rendering, data hosting and transfer, and content control" Mr. Petit says.

Drug marketing will always have a place, as companies need to drive awareness to new or existing brands, according to David Toliver, senior manager, customer acquisition marketing, Angel.

"That being said, once a consumer becomes a brand customer, mobile apps can most certainly decrease the costs associated with drug marketing," he says. "This can happen both on the consumer and HCP side."

Because of the increased modes of commu-

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DAVE DUPLAY. Founder and President, MedTera, an integrated marketing solutions partner dedicated to improving

education, promotion, and communications in the healthcare, life-sciences, and pharmaceutical industries. For more information, visit medterasolutions.com.



KURT MUELLER. Chief Digital and Science Officer, Roska Healthcare Advertising, a full-service ad agency that integrates

data and insight-driven marketing and advertising solutions. For more information, visit roskahealthcare.com.



JAMIE PECK. Rosetta Managing Partner, Rosetta, an independent digital marketing agency. For more information, visit

rosetta.com.



XAVIER PETIT. Senior Consultant, Integrated Marketing Multi-Channel Strategy Services, Shire US, a global specialty

biopharmaceutical company. For more information, visit shire.com. (Editor's Note: The insights expressed by Mr. Petit reflect his personal opinions and not those of his employer.)



DAVID TOLIVER. Senior Manager, Customer Acquisition Marketing, Angel, a subsidiary of MicroStrategy, and a

provider of on-demand IVR and call center solutions. For more information, visit angel.com.



OLIVIER ZITOUN. CEO, Founder, Eveo, an independent digital healthcare agency. For more information, visit eveo.com, or e-mail media@eveo.com.

Medication on Schedule

The Medication Adherence and mHealth study by George Washington University found that using mobile technology can be a helpful tool for patients who often struggle to keep track of their medication schedules. The survey focused on results from the Vocol Pill Phone app. The app runs on a handset connected to Cricket's 3G EvDO network and incorporates Qualcomm chipsets. The tool allows caregivers to program reminders for dosages using a secure Web application and to compile an online dosage diary.

Physician Survey: Compliance Programs Attached to Treatment Sway Prescribing Choices

The results of an independent, 100-physician survey revealed that 30% of doctors would prescribe a drug that had a multiplatform adherence program, including, sweepstakes, financial rewards, prizes, quizzes, and education, attached to it over one that did not. The study also found that physicians believed that only 60% of their patients were adequately compliant with their medications. Almost 90% of physicians were comfortable with the idea of rewarding patients for adherence, in combination with education.

Source: HealthPrize Technologies.
For more information, visit healthprize.com.

nication and the direct connection between the brand and the HCP/consumer, information can be pushed directly through much lower-cost modes. A push notification is less expensive than an e-mail, SMS, or phone call. Additionally, information provided through a mobile app means greater distribution, and there is the ability to simply push out an update versus reprinting new print materials and destroying old versions when a change is made.

“Mobile apps can increase and improve interactions between brands and consumers, and from an adherence perspective, they can add a number of layers for compliance to a drug program,” Mr. Toliver says. “Notifications can be scheduled to appear on a patient’s phone throughout the day reminding them to take a drug, or asking them questions about their treatment. In this example, the data from the brief survey would be pushed to a backend database for logging, and triggers can be set in the event that a patient doesn’t check in, or reports an adverse event. Aside from reminders and check-ins, adherence programs can be adapted to a mobile app to provide on-the-go information about the drug and program, provide personalized program status, and create an outreach connection between the customer and the brand if and when the customer needs a lifeline, coach, or sponsor. Increased adherence and increased success of drug programs always translate to increased drug sales, giving any brand a competitive edge.”

Dave Duplay, president, MedTera, believes the marketing spend will start to shift toward mobile apps.

“We expect a shift away from traditional offline or nondigital marketing to more dollars

being put toward online tactics,” Mr. Duplay says. “The real challenge for pharmaceutical marketers is how to get physicians, patients, and caregivers to the digital destination.”

An approach that works well is to create sensory stimulating dimensional digital links between print and electronic components; examples include full-motion videos, PURL programs, QR codes, and Web keys, he adds.

Kurt Mueller, chief digital and science officer, Roska Healthcare Advertising, agrees that there should be a shift in budgets and drug marketing behaviors away from the traditional one-size-fits-all approach that has plagued the industry for so long.

“The shift will be toward very strategic, targeted marketing technologies and applications that will be more relevant and useful to the audiences for which they are intended,” he says.

Mr. Petit predicts that across the healthcare industry many apps, mobile programs, and devices for adherence, compliance, and remote/self-monitoring will flourish in the next few quarters.

“The massive adoption of smartphones and tablets by physicians and healthcare providers will also trigger a sharp uptake in the use of e-sampling, e-prescribing, and e-detailing. Pharma will find opportunities to provide value to their customers around these solutions,” Mr. Petit says.

More importantly, the industry needs to remember that the primary goal is not about increasing drug sales and popularity, but about

achieving better health outcomes or health management for patients and caregivers, and decreasing the overall cost/burden on the healthcare system, Mr. Mueller says.

“Drug sales will follow and then provide the competitive advantage,” he says.

By way of example, Mr. Mueller cites a Merck program designed to improve outcomes, reduce hospitalization rates, and further improve quality of care. As part of the program, Merck entered into an agreement with Cigna as one of the first outcome-based contracts. Merck provided discounts if Cigna customers with diabetes lowered their blood sugar levels regardless of the medications they were taking.

“Of course, the competitive edge in this case was that Merck provided additional discounts if people who were prescribed Merck’s Januvia and Janumet took their medications according to their physician’s instructions,” he says.

According to Jamie Peck, managing partner, Rosetta, greater penetration of and access to systems and programs has the very real potential of lowering information costs, and therefore budgets.

“Mobile apps that are combined with medical treatments can give a drug the competitive edge,” he says. “Even before the rise of eHealth, mHealth, and Health 2.0, the Holy Grail of the industry has been to understand and drive compliance. Mobile apps will greatly influence compliance/adherence, driving a competitive edge for the manufacturer.” PV

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Pharma goes mobile: Making the most of the app opportunity



As smartphones and tablets take over, pharma needs a strategic understanding of how mobile solutions improve customer outreach and drive competitive advantage.

Andrew Tolve reports

The popularity of smartphones like the iPhone has created an entirely new marketplace for mobile applications.

With one click, customers can download apps for a seemingly boundless range of functions, to track the weather, find new music, get directions, and meet new friends.

Pharmaceutical companies are starting to see the value these apps can provide.

A properly designed app—be it a medication tracker, a disease calculator, an educational catalogue, or a patient diary—can improve the lives of patients and physicians and thus increase customer collaboration.

At the same time, a well-designed app in the hands of sales reps and marketers can maximize organizational efficiency and create competitive advantage when it comes to selling drugs.

In the past year, pharma investments in smartphone apps, social media platforms, and wireless devices have grown 78 percent, according to Ernst & Young's annual global pharmaceutical report.

David Hunt, digital director of Creative Lynx, a digital design and marketing agency that works with many of the top Big Pharma companies, says he "can't believe" the demand from pharma for apps.

"Mobile technology represents a significant growth area for our company, and we are witnessing real demand from our clients right now," he says.

Pharma companies need to develop a strategic understanding of how these mobile solutions can improve customer outreach and drive competitive advantage, both externally and internally, especially as smartphones and tablets become more pervasive.

Patient and physician apps

If you go to the Apple App Store today, you'll

find thousands of medical applications; about 50 of these belong to the pharmaceutical industry.

Abbott, AstraZeneca, Bayer, GlaxoSmithKline, Johnson & Johnson, Merck, Novartis, Pfizer, Roche, and Sanofi-aventis all have apps on the market.

Many of these apps target physicians and nurses.

Novartis' GIST Calculator, for instance, lets physicians calculate a patient's Risk of recurrence for Gastrointestinal Stromal Tumors (GIST) with an iPhone or iPod Touch.

Roche's Nursing ACE provides nurses with patient educational information and contacts for nearby clinical coordinators.

And Johnson & Johnson's Psoriasis App gives dermatologists an easy and accurate way to calculate PASI scores during patient check-ups.

When done right, these apps can create value for physicians and find widespread traction among target stakeholders.

The Psoriasis App, for instance, was released a year ago and already has been localized in 25 languages.

It averages 60 downloads a day and has diagnosed 27,000 patients.

"That's all from a little app that was relatively inexpensive to develop," says Hunt whose team at Creative Lynx designed the Psoriasis App.

Pharma apps also aim to make the lives of patients better, whether by managing chronic conditions or providing reminders about medications and doctors appointments.

Merck's iChemoDiary, for example, gives patients an easy way to record treatments and medications and keep track of the symptoms they experience.

Bayer's Kid-K teaches kids about hemophilia and the fun they can have despite their chronic condition.

And Sanofi-aventis' GoMeals lets users access nutritional information of everyday foods, track the values of their food intake by meal and



by day, and monitor personal consumption of carbs, fats, and proteins.

When done right, these apps can build a positive association between a brand and a lifestyle and can be integrated into every part of patients' lives.

There's no better example than GoMeals, which has been downloaded more than 300,000 times and ranks 77th on Apple's Top 1,000 for Health & Fitness, the highest ranked pharma app.

"GoMeals is a way for people living with diabetes to access the information they need where, when, and how they want it," says Lindsey Schedler, manager of communications at Sanofi-aventis US.

Sales and marketing apps

The mobile revolution can add efficiency and effectiveness to pharma's internal functions as well.

The right apps turn mobile devices into powerful, real-time tools for sales forces and marketers.

This is especially true of the iPad, which is receiving huge interest from the industry right now.

"On its own, the iPad is perceived as a cool gadget," says Dan Goldsmith, general manager, Veeva Systems.

"Pair this with dedicated and fully integrated CRM and CLM applications and you have a solution that can transform customer interactions, improve sales and marketing collaboration, and help pharma gain real competitive advantage."

Just last month, Veeva launched iRep, an integrated customer relationship management (CRM) and closed-loop marketing (CLM) solution designed specifically for the iPad.

"iRep unites the two core components of CRM and CLM into a single, sleek solution," says Goldsmith.

Four of the top 12 global pharma companies are currently in the process of deploying iRep.

"Through integrated CRM and CLM solutions on the iPad, organizations have a real opportunity to improve reps' delivery of the brand message and create a feedback loop that brings together brand strategy, sales execution, and customer response," adds Goldsmith.

Other digital media and software firms have unveiled apps as well.

Agnitio, for instance, has iPad Native, which lets sales teams develop dynamic presentations for the iPad, publish CRM target lists, and capture unique business intelligence data in real time.

Proscaper has the iShowPlayer, an app that lets companies transfer their current presentations to the iPad with as little bother as possible.

All 35 of Proscaper's customers in the life sciences industry will have deployed the iShowPlayer by June 2011.

A mobile future

In the past five years, the online world has morphed from a largely sedentary one—laptop- and desktop-based—to a mobile one.

It's hard to see that trend slowing down as people get more used to always-on connectivity.

As Ernst and Young points out in its annual report, investments by non-pharma companies and new entrants in the healthcare space are outpacing those made by pharma companies, challenging industry members to either increase their level of investment or risk diminished relevance.

Schedler says Sanofi-aventis understands the importance of this moment and the need to stay engaged.

"We've seen ample evidence within other industries that digital technology and social media are now essential for engagement," she says.

To read the full version of this article including recommendations for Pharma Apps best practice go to <http://social.eyeforpharma.com/story/pharma-goes-mobile-making-most-app-opportunity>

To read the rest of our Apps special report go online to: <http://social.eyeforpharma.com/story/app-special-report-summary>

