



Patient SOLUTIONS

As healthcare systems begin to pay for outcomes rather than products, patient-centric solutions and services will play a key role in the race to capture value.

From wearables to improved drug delivery devices, from apps to EHR platforms, from patient trackers to packaging, the number of solutions, tools, and products available and being developed to improve patient care is growing exponentially and is being driven by the need of pharmaceutical companies to provide, and more importantly, prove value through improved outcomes.

It's become generally recognized that there are limitations to the value a single drug can bring to the management of complex, chronic diseases, and now therapeutic success is being determined not only by the molecule but by a combination of drugs, physician interventions, home assistance solutions, and lifestyle changes. All of these are being connected through a growing number of patient-based solutions and tools.

Capturing Value with Patient-Centric Solutions

Several companies are embracing patient-centric solutions as an alternative business model to the traditional product focus. According to A.T. Kearney, these models — exemplified in the United Kingdom by Pfizer Health Solutions, a division that runs integrated care programs for chronic diseases — aim to increase quality of life and avoid costly hospital treatments by offering prevention, early diagnosis, and remote care to chronically ill patients. The value proposition for healthcare payers is evident: These programs seek to reduce costs and, in theory, can legitimately aspire to be commissioned by a national health service (think the United Kingdom) or reimbursed by health insurance companies (for example, in Germany, the Netherlands, and Switzerland), or local health authorities (think Italy) — whether on a per-patient or per-time basis, or using a risk-sharing model.

Another company embracing the movement of patient centrality is UCB, which set up a department in 2010 specifically to focus on patient solutions. The goal of this team with the help of cross-functional innovation and business review teams, is to not only provide patients with the best medicines, but also to go that step further and develop additional

FAST FACT

ACCORDING TO INDUSTRY ESTIMATES, 500 MILLION SMARTPHONE USERS WORLDWIDE WILL BE USING A HEALTHCARE APPLICATION BY 2015, AND BY 2018, 50% OF THE MORE THAN 3.4 BILLION SMARTPHONE AND TABLET USERS WILL HAVE DOWNLOADED MOBILE HEALTH APPLICATIONS.

Source: FDA

tools and support for patients, families, and caregivers to help them more optimally manage their lives and help the patient achieve a better outcome.

According to UCB, patient solutions can be as varied as the different stages of the disease journey that patients are experiencing: beginning with the first symptoms, continuing to diagnosis, then to treatment choice and optimization and eventually the improved life with disease. All those steps and stages are different from one disease to another one.

Patient solutions are for instance tools to help the patient remember to take his medicines, tools to help the patient track how he is feeling so that he can share an accurate report with his healthcare giver — physician, nurse, pharmacist, etc. — tools to help educate the community about a certain disease so that patients might understand their disease earlier, special or different packaging of products for patients, or alternatives to picking up medicine at the pharmacy.

An illustrative example of a tool developed by UCB for those with Parkinson's disease is its Well-Being Map. It is a simple and easy-to-use visual scale used to objectify and monitor both motor and non-motor symptoms by the patients. The map helps them to assess their health status, facilitate communication with their doctor, and make the most of limited time available during consultation.

VIEWPOINTS



BRANNON CASHION

Global President
Addison Whitney

Helping Patients Experience the Best Possible Outcomes

Recently, a pharmaceutical manufacturer recognized World MS Day by announcing the launch of its updated electronic injection device for the self-administration of the company's disease-modifying drug used to treat relapsing forms of multiple sclerosis (MS). The new device will allow patients to self-inject. It will collect and store data such as injection times, dates, and doses and send the information wirelessly to the secure MSdialog server. It is just a matter of placing the new device in its transmitter and pressing a button.



TIM DAVIS

CEO and Co-founder
Exco InTouch

Connected Health

The growth of mobile ownership and the

wealth of complementary connected technologies enable mHealth solutions that go beyond simple apps and bring together various inputs, using subjective responses from patients (or their caregivers) alongside objective data from medical and lifestyle devices. Consequently, patients' individual progress can be assessed in order to provide personalized information, motivation, and support that helps them and their HCPs monitor progress and better manage their condition.



ROBBIE MCCARTHY

Principal, Managing Director
The Patient Experience Project

Understanding the Patient Experience

Today, most marketers recognize that better understanding patient and caregiver needs is critical for brand success. However, what is the best approach to market research? Applying a patient experience framework breaks down the patient experience into its core dimensions, including clinical, physical, educational, psychological, economic, and social metrics. This approach allows us to better organize a market research plan and build a clear benchmark of what the optimal experience looks like and how your brand measures up.



DAN BOBEAR

Principal and Managing Director
The Patient Experience Project

An Authentic Patient Experience

It is very important for pharma companies to stay connected to what patients actually experience when managing their conditions and medications. Pharma marketers must place appropriate mechanisms to keenly partner with patients and caregivers in strategy development, program planning, and content creation. Also important is that patients and caregivers actively participate in an ongoing partnership about their needs and how best to connect to different patient communities. Marketers who work in this way create authentic programs and communications that truly connect to the community because they were created with the community.



EUGENE LEE

VP of Digital Products
PDR Network

Improving Patient Care

EHR systems are incorporating tools within workflow that empower healthcare providers to provide better patient care. By making updated drug information available at the point

of care, healthcare providers ensure that the medication they select is being prescribed safely and appropriately for that patient. Additionally, they can send tailored drug educational information directly to the EHR's patient portal to support patient adherence and better health outcomes.

Connected Health Leads to More Active Role for Patients

Connected health is helping patients take a more active role in their health. EHR patient portals open a direct link between patients and their HCPs to share critical information such as test results, drug information, and educational materials that support the patient's treatment and adherence. These tools will soon allow HCPs to address larger public health issues by leveraging trending data to identify challenges before they become larger health problems.



JIM O'DEA

President and CEO
Rx EDGE Pharmacy Networks
A business unit of
LeveragePoint Media

Pharmacies to the Forefront of Care

At the National Association of Chain Drug Stores' annual gathering of pharmacy executives and their business partners, patient care, and support were the predominate themes. People are increasingly turning to the community pharmacy to meet their healthcare needs. There are an abundance of examples: in-store clinics, immunizations, and other wellness services, smoking cessation programs, chronic patient care, and the expanding role of the pharmacist just to name a few. These services are leading to healthier consumers, better outcomes, and lower healthcare costs.

JEREMY SHUBERT

Chief Information Officer
Triplefin



New Engagement Technologies

New patient engagement technologies are coming to the market. For so long we've been talking about EMR and ePrescribe systems, which are internally focused, and now healthcare is finally catching up to consumer technology. It's the products and services that will bring transparency and portability to the patient.

If you consider it another way, it's all the technology that helps to create healthy behaviors and adherence when you are not at the doctor's office and then integrates that behavioral data with the medical data. This will be a powerful combination that enables the patient and provider to have a deeper relationship that truly drives healthy lifestyles.



INGRID BLAIR

Business Director
3M Drug Delivery Systems

Compliance Technologies

To gain the full benefit of a treatment, patients must be able to stay compliant. This is a challenge in situations where a patient's diagnosis doesn't match well with a delivery system — for instance, a pill treatment for nausea/emesis. However, a transdermal patch, such as ProS-trakan's Sancuso, is an ideal delivery method for this scenario, allowing patients to comfortably get the full dose of medication.

Bringing Caregivers Into the Conversation

Physicians are often included of course. But too often, caregivers are left out of consideration when products are being designed.

Caregivers must ensure pills are given on time and successfully swallowed. A transdermal patch, on the other hand, can be applied painlessly and even allow the caregiver to write the date and time of administration. These caregiver-friendly features can make a big difference in compliance.



A New Movement

A.T. Kearny analysts recognize that providing health solutions is not a new idea, and neither is applying IT in health services, but over the years, market players have learned that patient-centric health solutions are not just another application of information and communication technology — popular thinking in the midst of the dot-com boom — but need viable value propositions for the health system.

Innovative solutions can be driven by technology such as remote monitoring or e-health applications or by medical understanding of certain diseases — the distinguishing competencies of medical technology and pharmaceutical companies respectively. Philips, for example, launched its Motiva telemedicine remote monitoring program based on its device technology but provides an integrated service. AstraZeneca teamed up with Geisinger Health System in the United States to develop an e-health initiative to reduce cardiovascular disease and improve

Americans Using Wearables for Health Share Info With Others

According to a recent survey conducted by Harris Poll on behalf of Wellocracy, the majority of Americans currently using wearable activity trackers or mobile apps share their personal health and wellness data with others. Further, most Americans reported that they want personalized feedback on their data and are willing to pay for it, especially from a trusted health expert, such as a doctor, nutritionist, or fitness trainer.

Wellocracy, a free, online community created by the Center for Connected Health, a division of Partners HealthCare, offers unbiased, easy-to-understand information on new personal self-health technologies, such as health and fitness trackers and mobile apps.

The survey found that 28% of Americans said they have used wearable activity trackers or apps on their smartphone or tablet during the past 12 months. Of those using wearable devices and apps, 72% reported sharing their personal health data with:

- » Family (46%)
- » Fitness trainer, doctor, nutritionist, or other healthcare professional (34%)
- » Friends and colleagues (33%)
- » Social media network (16%)

For more information, visit wellocracy.com.

patient care. Additionally, smaller companies and start-ups are developing a wide range of services. For example, Telbios, an Italian e-health company, provides telemedicine services to national and local payers, and SHL Telemedicine provides services to health insurance companies in Israel and Germany.

As evidenced by these innovative company solutions, the learning curve has improved, and examples of patient-centric health solutions can be found in many healthcare markets. A.T. Kearney analysts say a look at more than 100 services now offered by pharmaceutical and medical technology companies reveals a continuum that ranges from products to stand-alone, value-based services.

Product-related services have evolved straight from the products. Examples include patient adherence programs such as Roche's Motivation, Advice, and Proactive (MAP) Support Program for patients prescribed Xenical obesity treatment, AstraZeneca's interactive online program for asthma patients taking Symbicort, or Novartis' ExtraCare support program for multiple sclerosis patients. In medical technology, the Philips Ambient Experience lets patients personalize their exam room with lights, images, and sounds — for example, replicating an African savanna, a rainy forest, a robot's space journey, or an underwater adventure — while undergoing diagnostic testing with the company's devices.

Making Healthcare Personal

As the industry struggles to completely realize the benefits of true personalized medicine, tools and solutions are filling the void to provide personalization to healthcare.

Amid the excitement and controversy around Apples' iWatch, ABI Research reports that over the next five years, there will be 100 million wearable remote patient monitoring devices.

This growth, ABI said, is in part a result of providers that are more aware of the benefits remote patient monitoring wearable devices can provide to patients outside of the hospital. ABI adds that because of the growing interest in these devices, there's a bigger opportunity for platforms that collect data from several devices and apps, for example Apple's HealthKit.

While HealthKit hasn't officially launched for the public yet, Apple has secured partnerships with many healthcare companies. The company announced its partnership with EHR vendor Epic Systems when it unveiled the product, but since then, there have been rumors that Apple is also in talks with Allscripts, and various providers, including Johns Hopkins, Mt. Sinai, and the Cleveland Clinic.

"Data have traditionally resided in silos be-

longing to specific applications delivered primarily by device vendors themselves," says ABI Research Principal Analyst Jonathan Collins. "New cloud platforms capable of collecting data from a range of vendor devices and sharing it securely with a range of related parties including patients, healthcare providers, and payers will drive adoption and bring more connected devices to market."

In February 2014, ABI reported that health and fitness wearable computing devices will be a main driver of the 90 million wearable devices that are expected to ship in 2014. Shipment estimates for healthcare wearables were about 13 million in 2013, but will reach 22 million in 2014, and 34 million in 2015. Health and fitness wearable shipments were 32 million in 2013, but will be 42 million in 2014, and 57 million in 2015.

Other technology companies, such as Google are also investing heavily in the healthcare space. Google recently bought Lift Labs, a San Francisco company that makes a high-tech spoon designed to make it easier for people with neurodegenerative tremors to eat, the latest in a growing list of moves the search giant has made into the life sciences. Lift Labs is being integrated into Google Life Sciences, which is a part of Google [X], the company's long-term projects division. (For more information about other Google projects, please see this month's Innovator's Corner.)

The Payer Movement

As the movement toward patient continues to evolve and the focus on outcomes intensifies, health plans will become an increasingly more important of the equation. According to the Healthcare Trends Institute (HTI), the term patient-centric applies to almost every change in the evolving healthcare system, and similar to consumer-driven, it signifies a universal focus on the end-user of healthcare: the individual who is shopping for care, receiving care, paying for care, and evaluating care. Patient-centric describes the new value-based model of healthcare delivery, which emphasizes care quality, improved outcomes, and patient satisfaction.

HTI says health plans have helped pave the way for consumer-driven healthcare by offering coverage solutions that engage people in the management of their healthcare, for example HSA Programs, as well as providing members with resources to make informed healthcare decisions. Their shift toward patient-centric healthcare, in contrast, has less to do with an insured's role as a healthcare consumer but rather their position at the center of their healthcare delivery. As major payers and care coordinators, health plans will be an increasingly important part of this system.



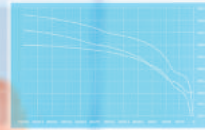
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Healthcare reform and healthcare payment reform have put the spotlight on quality.

Providers are being assessed on a variety of criteria, and patient satisfaction is becoming a

bigger part of the reimbursement equation. In a recent Forbes article, *Health Care Innovation—It's All About The Business Model*, the current healthcare delivery model is compared to a 19th century assembly line model, in which providers are evaluated and paid based on their production of pieces — such as a medical test or procedure — and not the whole human being.

However, HTI analysts say this is changing. Healthcare organizations on the whole are becoming more patient-centric by selling consumers on the value of “whole person care.” For example, Accountable Care Organizations, whose providers’ compensation is based on how well they care for a population of patients, as opposed to how many. This patient-centered model depends on outcomes —and better outcomes go hand-in-hand with better quality. Health plans need to watch these trends and prepare for changes in the way services are priced and providers are paid.

Health plans are helping to serve the whole person through medical care management, coordinating members’ care across multiple physicians, specialists, medications, or treatment options. By pulling resources into a system that includes all aspects of a person’s healthcare, health plans can help to improve patient-provider-payer communication, treatment adherence, and a range of other factors that affect better outcomes.

More health plans are using data to drive process changes. HTI says predictive analyses, for instance, can help a health plan identify at-risk members to target for intervention or care management, making an impact on future medical claims and, again, outcomes.

Additionally, healthcare IT is making it easier and more affordable for health plans to provide insured’s with Web-based and mobile support, which is an area of tremendous growth and opportunity for health plans.

A proactive customer service strategy, HTI says can go a long way to help health plans become more patient-centric and centered on quality and value. By stressing prevention and giving members access to decision support tools, they encourage people to engage early and often as active managers of their healthcare. And resources such as self-service tools, health information portals, and healthcare cost estimators promote member activity throughout the patient lifecycle. **PV**

Racing to Scale

According to A.T. Kearney, there are four actions that can put innovative players in the pharmaceutical and medical technology space at the front of the patient-centric race:

1. Define a long-term vision for healthy patients and a healthy business with a clear value proposition for patients, physicians, and payers. Many programs have failed to activate all stakeholders in the short term. Healthcare payers will only support an offer that presents them with a positive business case, which is especially difficult to construct for front-end prevention programs. Hardly any offer will gain widespread acceptance without physician engagement. Despite healthcare reforms and power shifts to insurance companies and national health service structures, physician recommendations will almost exclusively determine patient participation. For patients, the value must be visible every day. User-friendly services must help them stay healthy and improve their quality of life. Solutions designed for actual consumers’ habits are likely to succeed, while those that ignore real-life situations will probably fail despite scientific soundness. So, in designing a new solution, all relevant voices must be heard and their needs reflected in the offer. The ideal offer will yield continuous revenue based on patients staying healthier and ensure that costs are really taken out of the system. New, “cheaper” services should replace — rather than supplement — old, “expensive” care.

2. Target the right patients from the start, and plan a life cycle early. If the service solution is not properly deployed to capable patients who are willing to use it, the service model will fail, no matter how solid the clinical rationale. Targeting the right patient segment requires not only an assessment of their medical needs but also of their behaviors and motivations to use a health service. The better a patient segment is defined, the easier it will be to demonstrate the value proposition to payers. And only with adept, motivated patients will the value be realized.

How to continually expand the customer

base is something that must be considered in the innovation strategy from the outset, because innovation cycles in services, especially e-services, are much faster than anything pharmaceutical or medical technology companies are accustomed to. For technology-based services, this is both good news and bad: The cost to “make” will inevitably come down; but companies will need to constantly renew technology and service models, and margins on technology will drop rapidly after the initial introduction. This provides an opportunity: The better the technology and service roadmap, the easier it will be to expand into adjacent market segments, such as consumer healthcare.

3. Seek the best possible alliances, and exploit core competencies. Many technology and service providers have already mastered the art of service deployment and customization. Forming partnerships with such companies is an intelligent way to leap up the steep learning curve that could otherwise make health services unsustainable.

On the distribution side, pharmacies are the natural partner for pharmaceutical and medical technology companies, as they have direct contact with providers and users, as well as medical knowledge. Although single pharmacies are unlikely to play a major role, large, vertically integrated pharmacy chains probably will. Mediq, Alliance Boots and Walgreens, and Shoppers Drug Mart are examples of companies that have not only captured important market shares but also are progressively moving toward a solution-provider role.

4. Prepare for a major transformation challenge. Establishing a solutions business will be a journey, eventually resulting in a new business unit. After all, a new way of doing business needs to be executed by people who, based on their healthcare experience, have grown accustomed to the product model. In addition, corporate processes have gone through many adaptations in order to optimally support the product model. Many parts of the old, well-oiled machine, be it the technology development or medical affairs, will be needed to make the new business tick. To realign them to the new goal, consistent and frequent communication is vital. And a positive customer response to a new, value-based offer will inspire the teams working on it.

For more information, visit atkearney.com.

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