

# Patient-Centricity: Ready *or Not*, HERE IT COMES

Patient-focused strategies become more crucial to success.

**T**here are differing opinions on just how much the industry has made the shift to including the patient and the patient experience in all aspects of its business. Some pharma companies can cite their own activities as examples that this paradigm shift exists, but others believe the industry is only at the cusp of consumer-focused strategies in bringing a drug to market. Either way, all agree that patient-centric strategies are the key to future success.

As the industry prepares to move the patient to the center of its commercialization efforts, it will want to examine principles of consumerism in go-to-market strategies, says John Doyle, Dr.P.H., senior VP and managing director, global market access at Quintiles.

“Marketing and sales teams can now segment consumers by factors, such as their healthcare-seeking behavior, buying habits, and channel preferences, in an effort to appraise their customers’ needs,” Mr. Doyle says. “Accordingly, they can use a multichannel approach, including social media, to reach patients with promotional and educational materials tailored to differentiate their products based on individual preferences and healthcare needs.”

This is driven by patients increasingly behaving as proactive healthcare consumers and seeking to manage their own outcomes. This transformation from reactive patients to proactive consumers takes place against a backdrop of impactful sociodemographic

trends that is increasingly characterized by better-connected and informed populations.

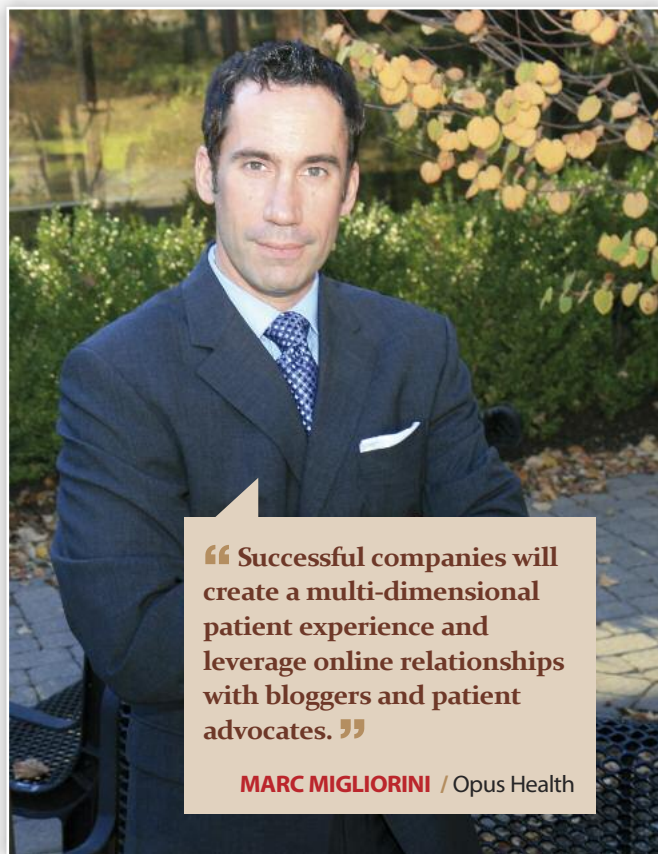
According to Michelle Keefe, chief operating officer at Publicis Touchpoint Solutions, the life-sciences industry is most definitely ready to make the patient a central focus.

“We are already seeing substantially greater investment in tools and resources that focus on patients and health outcomes,” she says. “A more patient-centric and outcomes-based approach is also where other players in healthcare, such as managed markets and hospital systems, are moving. So increasingly, emphasis on the patient is what success looks like in healthcare.”

Brad Sitler, principal industry consultant at SAS Center for Health Analytics and Insights, says pharma companies are starting to adopt a customer-centric approach or plan to adopt one. Mr. Sitler cautions, however, that moving to a patient-centered commercialization approach requires more than organizational redesign. It will require a change to the commercial model to stay relevant to the marketplace.

“The marketplace has fundamentally shifted from fee for service to fee for value,” he says. “Until a pharma company defines its role

in the new value chain with payers, providers, and ACOs, realizing value beyond the clinical benefit from its drug will be challenging. Pharma companies have spent hundreds of millions of dollars over the years understanding the patient journey; the needs, attitudes,



“Successful companies will create a multi-dimensional patient experience and leverage online relationships with bloggers and patient advocates.”

MARC MIGLIORINI / Opus Health



“Companies will need to communicate in ways that are clear and concise and seek to add value to patients.”

**PATRICK FLOCHEL** / EY



“We have an opportunity to truly change people’s lives by supporting, connecting, helping them manage the ever-changing healthcare landscape.”

**ILANA ROBBINS**  
Millennium: The Takeda  
Oncology Company



“The industry needs to expand its perspective and skill sets to understand how behavioral factors affect clinical outcomes.”

**ROB PETERS**  
MicroMass Communications

and behaviors of patients in their everyday life, outside the exam room. The pharma companies that can monetize these patient insights with payers and providers will be the first leaders in moving the patient to the center of their commercialization efforts.”

Rob Peters, senior VP, strategy at MicroMass Communications, has a more conservative view of the preparedness of the industry to shift its strategy to put patients in the center.

“The industry is not quite ready, but it’s getting closer,” Mr. Peters says. “For the patient to become the center of commercialization, both R&D and marketing efforts must be aligned and focused upon patient needs that drive positive outcomes. These needs can be both clinical as well as behavioral, and this is the element that pharma is just beginning to grasp.”

According to Mr. Peters, the industry needs to expand its perspective and skill sets

to understand how behavioral factors affect clinical outcomes as well as receptiveness to and request for a new drug. When these factors are considered early on in drug development, it will ultimately result in a product with much greater commercial value in real world use and opens the door for new behavioral products to be added to pharma portfolios.

Pratap Khedkar, managing principal and leader of ZS Associates’ pharmaceuticals practice, has the same thinking as Mr. Peters: the trend toward increased consumerization of healthcare is clear, but the industry still needs to work on developing a better understanding of the patient, the ultimate customer.

“Current commercialization efforts are more focused on HCPs,” he says. “As the influence of the patient in the treatment decision increases, the patient must be at the center.”

This will create a need to fully understand

### Global Partnerships in a Patient-Centric Environment

According to Glen Giovannetti, global life sciences leader at EY, traditional partnerships within the healthcare space will remain central to growth, including in areas such as generics, consumer products, and diagnostics. But companies also need to expand into non-traditional partnerships outside healthcare, such as partnerships with information technology companies and global logistics firms as well as with a broader suite of healthcare players, including patients, payers, and providers. In emerging markets, partnerships with distributors as well as ancillary services that may be unique to infrastructure and local cultures are becoming strategic imperatives.

**Patient-Centric Healthcare System Emerging in Singapore**



The Singapore Economic Development Board (EDB) is the lead government agency for planning and executing strategies to enhance Singapore's position as a global business center. It aims to create value-adding solutions for investors and companies in Singapore to ensure and

safeguard the existence of sustainable economic growth with vibrant business and good job opportunities. According to Kevin Lai, director of biomedical sciences and consumer businesses at EDB, the current healthcare delivery model in Asia is not sustainable, and the country faces an epidemic of chronic diseases, rapidly aging populations, shortage of skilled healthcare professionals, which is compounded by a burgeoning middle-class, ever increasing access, and demand for healthcare. A new paradigm is needed for sustainable, high-quality healthcare provision.

Mr. Lai says companies are starting to use data analytics to create a patient-centric healthcare system. Philips Healthcare's recent APAC Hospital-to-Home (H2H) business unit in Singapore is an example of how the industry is evolving to help health systems in Asia to address the growing challenges linked to a fast-growing and aging population. Through healthcare innovation, Philips' H2H business will seek to improve care transitions by offering re-admission management consulting, telehealth solutions for greater care continuity, and a personal health portal to engage patients and their families in their own health.

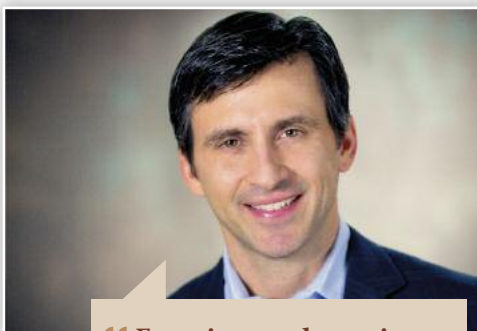
Philips will leverage its expertise in healthcare data analytics to enable predictive and timely interventions, delivering accurate answers at the time of need, and detecting critical issues before they become full-blown emergencies.

"By realizing hospital-to-home solutions that are relevant to the local care ecosystem, the hospital and the home can be bridged for a truly patient-centered care model," Mr. Lai says.

In the Asia Pacific region, Singapore is seen as a reference site for its healthcare system and a strong house in ICT capabilities, and therefore an ideal location to establish the regional headquarters for this new business.

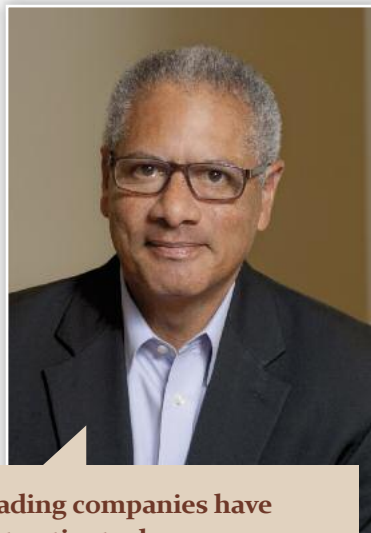
"Together with our local stakeholders, Philips will co-innovate and develop patient care models in Singapore to be marketed and exported to the rest of Asia that will enhance patient outcomes beyond hospital care," he says.

Source: Kevin Lai, director of biomedical sciences and consumer businesses, EDB



**“ Focusing on the patient perspective can drive quality healthcare in the system and ultimately achieve better outcomes. ”**

**DR. JOHN DOYLE / Quintiles**



**“ Leading companies have robust patient advocacy functions and a growing awareness of the importance of engaging with patient groups. ”**

**THOMAS SELLERS**  
Millennium: The Takeda  
Oncology Company

how patients make decisions; it will not be enough to map out a patient journey through disease progression. The industry will also need to map the patient's experience with the disease, the healthcare system, the provider, and the manufacturer.

"The pharmaceutical industry is just beginning to understand the importance of this latter step, so we will move in this direction," Mr. Khedkar says. "Part of the impetus also comes from the increased importance of specialty therapy areas, which are slated to account for as much as half of the top 100 drugs in a few years. In these specialty areas, each patient is much more critical to success, and the



**“ Moving to a patient-centered commercialization approach requires a change to the commercial model in order to stay relevant to the market place. ”**

**BRAD SITLER / SAS**

patient's experience is also a more complex phenomenon that can be studied and improved."

**Patient-Centered Healthcare Strategies**

Marc Migliorini, senior director, product marketing and innovation at Opus Health, a division of Cegecim Relationship Management, says successful companies that create a multidimensional patient experience and leverage online relationships with bloggers and patient advocates can help users achieve better health outcomes. By partnering with several health-related websites and mobile applications to create health community destinations, the industry is able to engage and enroll information-seeking patients and caregivers. Once enrolled in an online community, patients are offered disease state and product information as well as tools, resources, and usually the opportunity to connect with other patients.

"With patients taking a more active role in managing their health, they will want control and access to their healthcare information, and they will continue to share experiences about their treatment with peers through a variety of media including social networks," he says.

According to Lynn O'Connor Vos, CEO of



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“ Developing a better understanding of the customer is a critical capability. ”

PATRICK HOMER / SAS



“ At the heart of engaging the digital patient is a relationship built on trust. ”

RICH PILNIK / Quintiles



“ As the population ages and chronic-diseases increase, patients are more involved in their healthcare and are searching for more decision-making support. ”

LYNN O'CONNOR VOS  
ghg

ghg, because patients have greater access and appetite for healthcare information than ever before, they are actively seeking information to help improve their health.

“Social networks are playing an important role in healthcare decision making,” she says. “As the population ages and chronic-diseases increase, patients are more involved in their healthcare and are searching for more decision-making support. Technology has evolved to where it can effectively facilitate patient education. And these tools are critical as we face the most significant drop in practicing physicians in history. It is an opportunity to communicate more effectively with patients. At ghg, we believe that communications is the remedy to establishing a healthier world — and that belief inspires our work every day. We look for the vehicles, motivators, and incentives that will drive long-term behavior change and improve the patient-professional dialogue.”

As patients become more powerful over their own health decisions, their expectations of other healthcare stakeholders are changing. Patients expect providers, pharmaceutical companies, and others to be more transparent in their communications. This will put the pressure on pharma companies to engage patients rather than simply marketing to them.

While relevant content is important, it is only part of the equation, says Rob Peters, senior VP, Strategy, at MicroMass Communications.

“It is much more important for the industry to ensure that it provides value in communications to patients and this is where pharma still needs to put in more effort,” he says. “The

pharmaceutical industry does a good job at being relevant —delivering information and education pertinent to a patient’s condition — but that’s often as far as it goes. To deliver value and better leverage the role of the patient in commercialization, pharma needs to focus on understanding and actively changing patient health behaviors. These are often independent of specific conditions but are critical to ensuring that patients will see the full, real-world value of products when they enter the market.”

Biopharma companies have traditionally approached the market focusing on the needs of providers, and payers more recently, and must now move toward assessing patient’s clinical, economic, social, and humanistic needs as they progress on their healthcare journey.

“Biopharma firms can construct the proper compass for providers and payers to guide the appropriate use of their products in a way that maximizes benefit and minimizes risk to the patient,” Mr. Doyle says. “Focusing on the patient perspective can drive quality healthcare in the system and ultimately achieve better outcomes.”

One important concept to consider as part of the social engagement process is how patients interact with each other, says Ilana Robbins, manager, digital strategy and communications at Millennium: The Takeda Oncology Company.

“Digital and social have allowed people all over the world the opportunity to connect via subject-specific dedicated online communities, chat rooms that help give people the strength to battle their disease, games to help engage them in their own wellness and the opportu-

nity to attend live events such as support groups, conferences and more,” she says. “Wherever they are in the world, patients now have the opportunity to truly connect and engage with individuals facing similar issues like themselves, and this is incredibly powerful. There are plenty of companies that are in social, but many are not actually engaging directly with their audiences in a truly social way. In the current state of healthcare, it is no longer about pushing out of information but centered more on online engagement and interaction.”

Social media is a powerful platform, not just for reaching patients, but for listening to them and learning from them, says Diane Montross, VP, outreach services at MMG.

“We have been leveraging social media and mobile outreach in most of our clinical trial outreach programs for years now,” she says. “This provides an unvarnished view to their concerns and behaviors.”

Patients sharing with friends and family through these outlets propel campaigns to go viral, Ms. Montross says.

In social media, for instance, companies will need to communicate in ways that are clear and concise and seek to add value and build trust rather than engage in naked self promotion,” says Patrick Flochel, global pharmaceutical leader at EY. PV



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# Making Content Relevant TO CONNECT

With almost half of the world's population using the Internet by 2016, meaningful digital messages will be key in connecting with patients.

**T**he key to a successful social media strategy is to determine patient need, says Patrick Homer, principal industry consultant, global practice, health and life sciences, SAS.

And this is accomplished by an understanding of which channels patient groups are currently active in, understanding the collective issues that they are discussing and how to then interface with them so that a meaningful and compliant conversation can start to take place.

"Developing a better understanding of their customers is a critical capability," Mr. Homer says. "One way this is accomplished is through text analytics and taxonomies that support natural language processing to allow organizations to understand the true issues from millions of posted patient comments and identify how these are trending."

## Keeping Digital Content Relevant

Listening is also an important tool in keeping multichannel content relevant, a challenge that will only increase in the coming years. According to Ilana Robbins, manager, digital strategy and communications at Millennium: The Takeda Oncology Company, listening is the very least the industry should be doing.

"That is one lesson to be learned via social media — even if you don't have the capacity to be a part of the space — make sure you are at least listening," she says.

"As an industry we really need to be more aware of what is being discussed out there in the world beyond our walls," Ms. Robbins says. "If everyone took the time to truly listen to the conversations patients are having with each other and with physicians and really understood their needs, then we could ensure our communications would be relevant."

The next best step would be to create opportunities where the industry can actually interact with patients.

"Asking questions and listening to patients creates an open dialogue and gives us an opportunity to truly address needs," Ms. Robbins

says. "We recently launched a new unbranded campaign and in preparation for the creation of digital and social assets we sat down with patients, caregivers, and advocacy groups to discuss ideas. And we continue to have the open dialogue as our campaign moves forward."

The advent of "quantify me" type of tools like FitBit, Fuelband, BodyMedia, Jawbone and other sensors and the integration of the devices to smartphones provide life-sciences organizations with even more opportunity to have a closer interaction with the patient and gain better understanding on patient behaviors, says Nagaraja Srivatsan, senior VP and venture partner at Cognizant.

"Patient centricity should be front and center of any life sciences organizations strategy," Mr. Srivatsan says. "This medium of interaction and integration should be explored in 2014."

Patient advocacy teams within industry can facilitate relationships between patient organizations and other parts of the company while maintaining the independence necessary to be compliant. Patient groups have broad influence across the entire continuum of drug discovery and development, e.g., many groups now have robust biobanks, registries, patient natural histories, and patient-led research networks, as well as an array of direct services for patients and consumers, says Thomas Sellers, senior director, patient advocacy and corporate philanthropy, Millennium: The Takeda Oncology Company.

"Listen to patients and to patient advocacy groups by having a robust patient advocacy engagement function," he says. "That function should be interacting regularly with the groups in a way to be able to provide feedback on the priorities, vision, strategies, programs, and tactics that are being pursued by patients and patient groups."

The most trusted sources, whether for web-based, e-based, or written materials and information, come from established patient advocacy groups whose mission is focused first on serving patients.

"That is why it is important for industry to support patient advocacy groups in their initia-



**“Emphasis on the patient is what success looks like in healthcare.”**

**MICHELLE KEEFE**  
Publicis Touchpoint Solutions

tives to reach the e-patient as well as patients who come to them through more traditional channels," Mr. Sellers says. "And for that support to be effective and position a company as a leader, it is essential not to be perceived as only providing support where it benefits the company's or industry's narrow commercial interest."

Mr. Sellers says another opportunity for connecting with patients lies within strategic partnerships and collaborations that leverage the combined power of providers, payers, pharma, and patients. These alliances provide a platform that allows all four segments to benefit from addressing issues of mutual interest. According to Mr. Sellers, one example of this is Journey Forward, a collaboration between Genentech, Wellpoint, UCLA Cancer Center, Oncology Nursing Society, and National Coalition for Cancer Survivorship, to develop a computer based survivorship planning tool and Web-based resources that can improve the quality of care and help Commission of Cancer accredited programs comply with new patient-centered standards established by the American College of Surgeons.

Michelle Keefe, chief operating officer at

Publicis Touchpoint Solutions agrees that patient communications are only relevant when they offer real value by directly impacting a patient's health and/or quality-of-life.

"This is really the argument for clinical health educators, both field and contact center-based teams, that work to improve patient adherence, retention, and health outcomes through educational support," she says. "Clinical health education programs are unique in that they deliver a genuine win/win for every stakeholder, including patients, caregivers, HCPs, and payers."

It is important for pharma to listen and gain knowledge that helps it fully understand patients' needs, attitudes, and behaviors relative to a disease and the various treatments, as well as the daily challenges of living with and managing a disease. To be relevant with patients, the communication must be bi-directional and messages back to the patient must add value to each individual patient. Otherwise, as with other single directional communication, the patient will switch the channel.

However, regulatory is not likely to be comfortable with communicating with patients on a one-to-one basis, says Brad Sitler, principal industry consultant, SAS Center for Health Analytics and Insights.

"Regulatory is going to have to change how it approaches the perceived risks of social listening as well as collecting information on patients for developing on-going dialogue that is personalized, meaningful, and resonates with a patient," he says.

Shankar Narayanan, VP strategy, life sciences, at Cognizant cautions that the content and channel of communications must abide by industry standards and patient needs.

"It will be in the ability of a company to balance the need for immediacy versus accuracy of content, as well as ubiquitous versus trustworthy channels that will determine whether pharma companies earn the trust of their customers, regulators, and patients," he says.

Despite regulatory concerns, initiatives that go beyond digital channels and social media and include services that will provide the best value to patients are on the rise, says Nicole Johnson, senior VP, director of digital strategy, Flashpoint Medica.

For example, providing a digital space for patients to chat amongst themselves and share experiences with others will be the way of the future.

"As an industry, we have an opportunity to curate accurate information for patients so there are fewer burdens on them to seek it out and fewer burdens on providers to spend time filtering," she says. "We have access to the best thought leaders across specialties and should think about how to tap into their expertise better so that patients have access to these expert

opinions in real-time. Imagine an online information hub or friends-and-family room where patients, friends, and families could come together to support each other and have access to an expert to address their questions. In addition to experts, you could include a place for advocacy to help deliver a local aspect to the online experience."

This type of interaction would require a fair amount of trust on the part of patients, and pharma will have to build and earn that in order to be successful in patient engagement efforts. One way to forge a trusting relationship with patients is to provide value.

"At the heart of engaging the digital patient is a relationship built on trust," says Rich Pilonik, president, commercial solutions, at Quintiles. "By continuously providing content that is useful in a variety of formats, such as communities, newsletters, and outreach, the relationship can progress to familiarity and favorability. Providing content on-demand begins to build a two-way dialogue through which a trusting relationship can be forged. Once trust is built, the digital patient wants to more actively participate to create better health outcomes."

For communication to patients to be relevant, the content has to be at a level that the patient can understand.

"Patients must understand what they can achieve in terms of therapy goals and how that will impact their life; the science, which is the usual focus of pharma today, is not that impor-



**“Initiatives that go beyond digital channels and social media and include services that provide the best value to patients are on the rise.”**

**NICOLE JOHNSON / Flashpoint Medica**

tant in the communication," says Pratap Khedkar, managing principal and leader of ZS Associates' pharmaceuticals practice. "The patient needs to know what it would take for him to get better and what that means in terms of his quality of life. The communication must be simple and tangible." **PV**

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