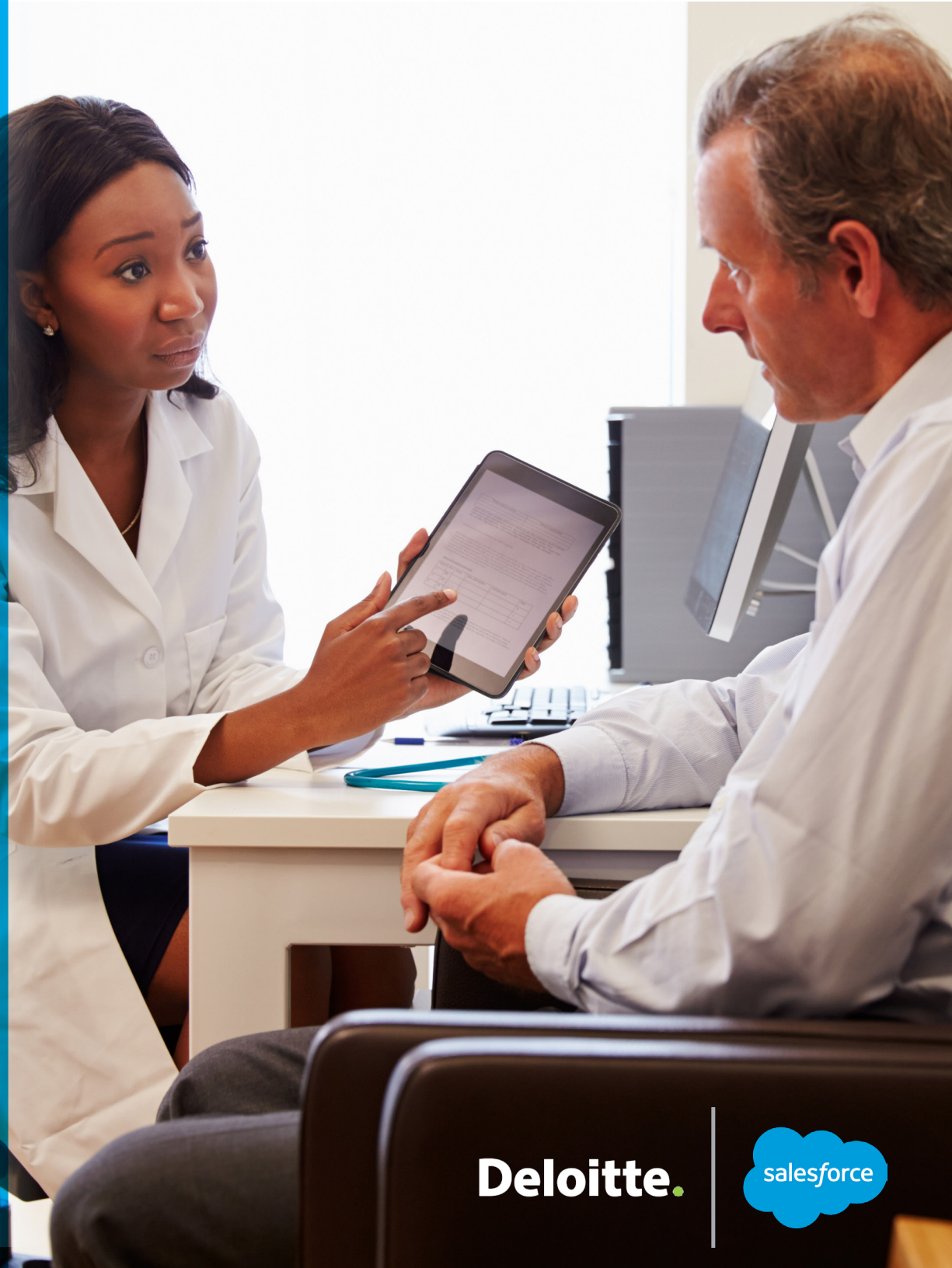


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The Move Toward Patient Centricity

LIFE SCIENCES

Patient Connect Accelerator eBook



Deloitte.

salesforce

The Pharmaceutical Industry Today

As data-collection, communication, self-care, and accessibility to treatment all undergo advancements, it is important to have a clear understanding of the trends driving these changes, areas of growth, and potential challenges ahead.

Technology has become an integral part of the everyday lives of consumers, presenting an array of challenges and opportunities. Information is everywhere. Even those with limited internet savvy can access medical material, interact with other patients, shop for insurance coverage, and research symptoms or healthcare issues. This focus on patient engagement and empowerment is driving rapid reorganization within the life sciences industry. Historically, for patients, pharmaceutical companies have not been the go-to sources for information, support, or counseling. But these companies are increasingly establishing capabilities, using technology, to help patients navigate diagnoses, understand treatment options, secure financial assistance, connect with other patients and community experts, and supplement clinical education. While doctors work harder to provide accurate and timely medical

information, pharmaceutical reps tailor their strategies to keep physicians up-to-date with information and supplies. Increasingly overwhelmed waiting rooms and limited access to doctors have created a demand for actionable solutions that can provide quick and compliant access to comprehensive medical records, freeing up time for providers, nurses, and their office staff.

Insurance companies also now strive to compete in a crowded marketplace. As patients are paying a premium for healthcare, they have expectations that their healthcare providers, insurance providers and drug manufacturers all have a 360° view of their status and interactions. As a result, pharmaceutical companies

Deloitte and Salesforce have rapidly deployed solutions for engaging patient services applications.

are in a unique position to drive value – and they must to successfully compete with new competitors (e.g. large consumer players like Nike) entering the healthcare market.⁽¹⁾ Pharma companies should move to a proactive engagement model in which engagement tools bolster both patients and healthcare providers. This benefits both the patient and the life sciences company: Patients get help with a range of both improved access to therapy and support services, while life sciences companies get assurance that their product is being adhered to in a way that can optimize efficacy and outcomes.

In the end, all players can benefit from the changes described above. Pharmaceutical companies can increase adherence to their products and better track real-world patient outcomes. Patients have access to support through new channels when they are away from their doctor's office. Healthcare providers can focus on delivering care and tracking outcomes. Pharmaceutical reps are in a better position to serve hospitals and doctors due to greater visibility into customer needs. Insurance companies can better market their services with clear patient profiles. Hospitals will benefit from the availability of well-defined self-care options.

¹ Global Mobile Health (mHealth) Market: Focus on Ecosystem (Devices & Services), Therapeutics, Application/ Solution Type & Regions

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With this in mind, the five key trends below have shown widespread effects across multiple players in the pharmaceutical marketplace:

- 1 Personalization of Care
- 2 Consumer Empowerment
- 3 Omni Channel Systems
- 4 Transparency & Data Sharing
- 5 Speed & Adaptability

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Personalization of Care



Personalization of Care

Personalization of care transforms patient services from a cookie-cutter solution to a patient-centered treatment approach through targeted care and therapy. It connects patient communities and digital tools, creating an environment where patients have access to their personal medical information, and doctors have the ability to create tailored preventive measures and treatments designed to cater to the unique nature of individual's condition.

Impact of the Trend

Personalized care will result in specific roadmaps for patient groups based on their behaviors or characteristics, with carefully targeted information and therapies, as well as follow-up schedules for ongoing engagement and medication reminders. These strategies rely on insight-driven engagement models, using predictive analytics to effectively target and understand patients. Patient communities will also play a role, as smaller groups of patients want to engage and connect with each other based on their personal care profiles.

Potential for Growth

Personalization of care has been regarded as the future of the healthcare industry for the last 5 years. Patients have the best clinical outcome by tailoring both preventative measures and treatments to meet their unique needs and characteristics.⁽²⁾ The industry is catching up to technology as advances in genome sequencing and its potential to track, treat and prevent patient illness before it occurs, which is creating significant interest in the field. Doctors and hospitals can reduce patient waiting times with a greater awareness of specific conditions, while pharmaceutical reps can cover more ground when their visits can be targeted only to areas in need. Patient services programs offered by pharmaceutical companies are also utilizing predictive analytics to better map and target patients based on their attitudes and placement in the patient journey.

Personalization of care transforms patient services and is widely regarded as the future of the healthcare industry

² Translational Informatics: Realizing the Promise of Knowledge-Driven Healthcare

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Consumer Empowerment



Consumer Empowerment

Changes in technology and the health care ecosystem are increasing the patient's role in traditional consumer decision-making and evolving their expectations from health care companies. As a result, patients are demanding care and solutions that are coordinated, convenient, customized, and accessible, and a number of nontraditional health companies are coming forward to address these emerging expectations. This has led to a broad "consumerization" of health care products, expanding the ecosystem beyond the traditional players of providers, payers, big pharma, and health care data companies to include retail giants such as Under Armour.³ As such, patients need to be thought of, and engaged as, educated consumers when it comes to their use of healthcare products and services.

Four major factors have contributed to the significant rise in consumer empowerment in healthcare. Beginning in the 1990s, advertising for prescription medicines started to shift from business-to-business (B2B) to business-to-consumer (B2C). As digital media became more readily available, consumers were given greater access to research that enabled them to search for symptoms and people

with similar ailments. Also, the booming health insurance industry has led to a marketplace which allows customers to shop for their preferred provider. Finally, the rise of drugstore clinics means a significant reduction in physician visits. Consumer empowerment puts the patient in the driver's seat – but the rapid growth of technology can cause problems if areas of concern such as access to relevant data and insufficient marketing are not correctly identified and addressed.

Impact of Trend

Consumer empowerment shifts the focus from the doctor to the patient, and allows the patient to know more about their healthcare, prescriptions, and wellness. It encourages a system of engagement over a system of siloed records by moving information online and into the hands of the people it concerns. The ability to research online, read reviews of healthcare providers, and receive consumer-to-consumer advice shifts the balance of power towards the patient. Additionally, doctors and healthcare providers can control their relationship with pharmaceutical and insurance companies and the amount

³ In-Depth: Under Armour's fitness app acquisition spree

of access to personal patient information they are willing to grant in addition to what is legally shareable.

Potential for Growth

The dramatic increase in health and wellness apps (currently 100,000+ available from online app stores) indicates tech companies are aware of the growing consumer interest in self-care. Providing patients with access to lab results allows them to have a clearer understanding of their diagnosis and work side by side with their physicians to plan effective methods of care. Empowering patients to take an active role in understanding and assessing their healthcare translates to a shared investment in personal wellness, which can result in less medical emergencies, relieving the burden on hospital and doctor's waiting rooms.

Areas of Concerns

According to a Pharma App Benchmarking Study conducted by research2guidance, from 2013 to 2014 app downloads in the pharmaceutical space grew 97% YoY showing a heightened want for these applications amongst consumers. Additionally, persuasive marketing

may drive consumers to make decisions based on marketing alone. The growth of drugstore care and generic brands can lead to consumers making decisions based on an inadequate understanding of their condition, while the variety of products on the market can result in losses for pharma companies as HCPs and patients become overwhelmed by choice and fall back on familiar and sometimes non-optimal drug choices. 'The healthcare system is set up for the convenience of providers, not patients...Patients seeking treatment are often burdened with high costs and long waits, which can intensify stress and health problems... The way healthcare providers are trained needs to change.'⁽⁴⁾

Consumer empowerment encourages a system of engagement over a system of stale records by moving information online and into the hands of the people it concerns.

⁴ Healthcare in the age of consumer empowerment

Omni-Channel Systems



Omni-Channel Engagement

Omni-channel engagement is breaking down the barriers marketers and sales reps encounter when trying to successfully communicate with physicians, patients, and partners. Traditionally established methods of engagement such as multi- or cross- channel fail to capitalize on the opportunity to give consumers a comprehensive brand experience.

Removing silos and embracing a system of engagement that includes the use of cloud, mobile, social, and data sharing encourages brand loyalty, effective service and efficiency, and increased incentive to stay connected beyond initial contact. If handled correctly, the full integration of customer-centric omni-channel engagement presents a significant opportunity for advancement in all aspects of healthcare.

Impact of Trend

Faster and more effective service opportunities create incremental sales and brand recognition in real time. Marketing teams supporting the sales process can reach customers via mobile technology, creating a more

attractive, expedient experience for both parties. The customer journey becomes coordinated across multiple channels creating a better knowledge base for doctors, and more self-service opportunities for the consumer.

Potential for growth

Omni-channel engagement represents a significant potential for deepened level of engagement on and offline. An engaged consumer is more likely to develop a relationship with the company and continue and deepen their partnership, and become an advocate for their provider. A growing familiarity with and understanding of technology allows for companies to comfortably adapt omni-channel engagement and confidently speak to their consumers across platforms.

An engaged consumer is more likely to develop a relationship with the company, and become an advocate for their provider.

Strategies to address growth

All platforms should embrace the technological revolution and commit to offering consumers access to their personal healthcare. Companies must pivot with the technology, and move quickly to keep up with tech-savvy consumers. Omni-channel engagement should be marketed as an attractive option across the board - clients have access to a more significant range of data, and consumers can take an active role in their health care. Fitness trackers, mobile apps, and websites designed with customer use in mind are essential in omni-channel marketing.

Areas of concern

Correct implementation of an omni-channel system of engagement requires a clear plan of action, and a specific execution model. Removing long-established information silos can create difficulties, as can the total incorporation of massive amounts of data that can conflict and overlap. To successfully launch a system of engagement, movement across channels must be seamless, and premature releases without extensive testing can quickly turn users off. The current generation of users is quick to adopt, but just as quick to disregard if the system is not providing accurate and useful information.



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Transparency & Data Sharing



Transparency & Data Sharing

Transparency and data sharing amongst healthcare partners have proven extremely successful in closing crucial gaps in data knowledge. Collecting data is both expensive and inherently risky due to the nature of clinical trials and human testing. Data sharing can reduce costs and cut down on the need for multiple trials that ultimately arrive at results that have already been achieved in other studies. Doctors and scientists have the opportunity to study meaningful data that could significantly improve on patient care, while reducing wait times for discovering crucial diagnoses.

Impact of Trend

Transparent distribution of valuable data and research allows for an increase in available medical knowledge, reducing the risks of unnecessary surgeries due to a lack of available medical information, excessive wait times in hospitals, and confusion over the importance of specific medications. Industry developments are increased, as testing and trials can occur in multiple locations, creating a comprehensive system of checks and balances.

Potential for Growth

Global pharmaceutical agencies are strongly encouraging the rapid growth in data collaboration. Both the Pharmaceutical Research and Manufacturers of America (PhRMA) and the European Federation of Pharmaceutical Industries and Associations (EFPIA) have encouraged transparency by creating a policy allowing data sharing. Co-operation between healthcare professionals, healthcare organizations, and the pharmaceutical industry are crucial for success.

Strategies to Address Growth of Trend

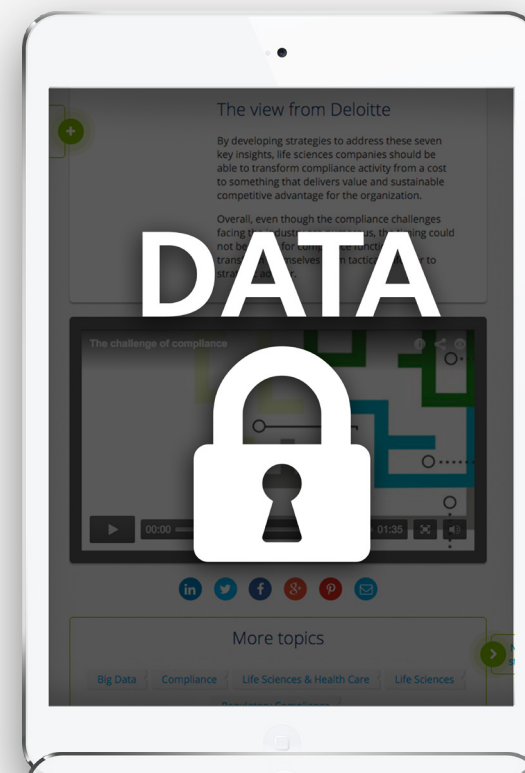
There are already active PhRMA members sharing trial data with partners. Many industry professionals are asking for information and research from the pharmaceutical industry, and there are active campaigns rallying for the release of data. PhRMA members who share clinical trial data are held in a positive light, demonstrating their commitment to a public responsibility. Conversely, companies not sharing data are increasingly met with critical reception. ⁽⁵⁾

⁵ Principles for Responsible Clinical Trial Data Sharing

Areas of Concern

The data sharing process does allow competitors to see valuable testing data. This could hurt agencies in a competitive marketplace, and without a carefully structured system of rewards and punishment for full compliance, some agencies may not share all their data or actively engage with policy.

Data sharing, now encouraged by PhRMA and EFPIA, can reduce costs and cut down on the need for multiple trials that ultimately arrive at results that have already been achieved in other studies.



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Speed & Adaptability



Speed & Adaptability

Speed and adaptability of care options should be considered crucial to all pharmaceutical market players. The industry is constantly changing as new discoveries and technology are propelling healthcare forward. Whether key players are adapting by improving patient care or creating a new drug to introduce to an emerging market, it must be done quickly and effectively to keep up with the competition from generic and private label brands.

Impact of Trend

Patients now expect urgency and speed when their health is at risk. Adaptability is key when problems with care options arise. Research and development departments need to determine drug demand and effectiveness, in order to adapt if the need is low or unprofitable. They must be able to act fast when there is a new demand from the patient concerning their care, whatever that demand may be. Speed of bringing a drug to market has always been a priority for pharmaceutical companies, hoping to optimize time on the market before patent expiry. New accelerated pathways to drug approval for treatments granted orphan drug status by the FDA have also caused a shift in focus from traditional 'blockbuster' markets to rare

diseases. As companies focus on these smaller markets, patient and healthcare provider engagement become even more important, as these disease areas are driven by smaller communities of patients and health care providers, more chronically ill patients, strict treatment regimens, and a complex reimbursement environment.

Potential for Growth

The potential for growth is significant, as healthcare providers and pharmaceutical companies alike are constantly looking for ways to improve patient care while reducing internal cost. They must not only adapt to new care options, but also create new medicines while keeping the future in mind.

Strategies to Address Growth of Trend

The trend in pharma-tech is pushing important new developments of patient care as companies become more effective in communication with their consumers. Accordingly, pharmaceutical companies are adapting to the new demand by leaning on omni-channel engagement. Finally, data transparency is allowing for a decrease in the amount of time from R&D to informing the key participants to sales.

Synopsis

The evolving state of the healthcare industry shows exceptional promise. Technology companies are invested in creating wearable and mobile devices capable of allowing personal monitoring of health and wellness, putting the power of care back in the hands of the people it concerns most. The shift towards personalized care allows patients to feel connected to their healthcare providers, and gives them an incentive to extend their relationship beyond the doctor's office. An empowered consumer, when well-informed, can create far reaching benefits beyond their own care – including relieving pressure on hospital wait times, and becoming brand advocates for pharma products. Increased transparency and sharing of data has a positive trickle down effect, speeding up R&D, cutting down on any individual company monopolizing drugs and treatments, and encouraging rapid product advancement. When speed & adaptability are folded into the day to day processes, significant business opportunities can follow.





Health Care & Life Sciences

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