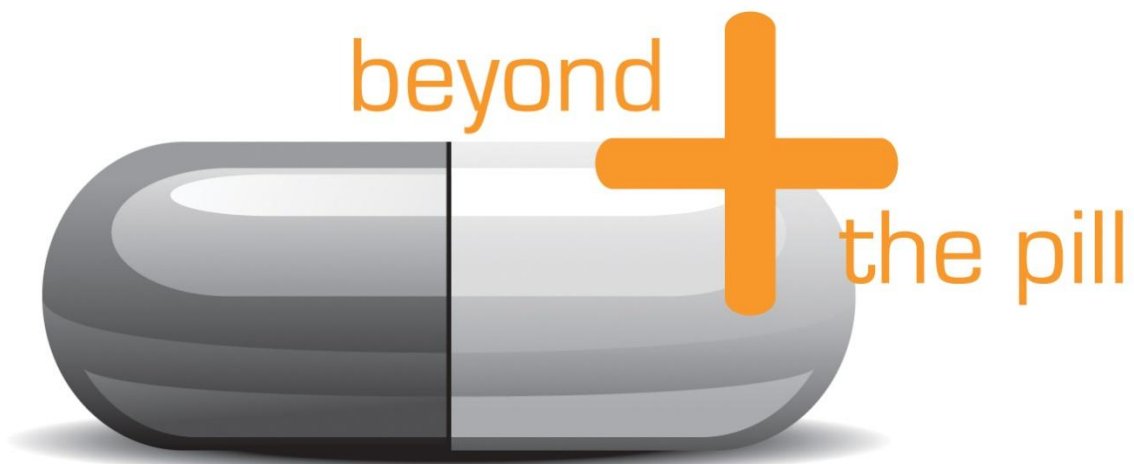


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Beyond The Pill: More than Just a Slogan

Debraj Dasgupta (Novartis) and Meike Wenzel (Executive Insight) discuss the concept of "Beyond the Pill", what it really means to implement such a system and how this is a game-changing revolution for the pharma industry.



Beyond the Pill: More than Just a Slogan

The days when it was enough for pharma to develop and commercialize pills are slowly disappearing. Patient engagement and a renewed focus on outcomes is the blockbuster model of tomorrow, and the industry needs to assess the way it operates and find a way to become a trusted partner within the healthcare system.

Thanks to their expertise, and the ability to think holistically about disease areas and outcomes, pharma is uniquely positioned to reinvent its commercial model, say Meike Wenzel, from Executive Insight Healthcare Consultants, and Debraj Dasgupta, Head of Specialty Commercialization and Adherence at Novartis.

Due to the ongoing economic recession and austerity measures for healthcare budgets across the board, governments around the world are now less able to afford rising healthcare costs the way they could in days gone by.

Patients' needs do not go away of course, and the widening gap between the needs of the public and dwindling healthcare budgets offers pharma an important opportunity to redefine their business model and fill the new white space in the market. Debraj describes the basic principle of going beyond the pill, "We'll still invest in innovation and R&D, but we're also going to think about adding game changing services to improve patient outcomes."

"This requires a mind-shift. [...] companies need to be open to co-creation, bringing in physician and patient inputs earlier to the service development process."

There are different strategies companies can adopt," Meike explains. "For example in Germany one pharma company are starting their own clinics in an effort to fully integrate themselves into the value chain, but there are other strategic options too, like adding highly customized services to the product that address patient needs and contribute to improving overall health outcomes," she added, pointing out that the key to doing this successfully is by asking patients what they really need and replacing the inside-out approach with one that goes outside-in.

Meike continues, "This requires a mind-shift. Solutions in pharma used to be designed internally, and once they were ready, they were presented to doctors and patients who said yes or no. But companies need to be open to co-creation, bringing in physician and patient inputs earlier to the service development process. The key to success is to go in with an open mind," she stressed.

"My personal vision is a one of co-creation," Debraj elaborated. "When I ask customers where they see pharma fitting into the healthcare system, I get a lot of skepticism, because they see pharma as someone who's out there to make money, not a

potential partner, and I think that's where the real opportunity for change is."

Debraj proposes a service-development process that invites opinions and expertise of other stakeholders early down the road. "Nothing is stopping pharma from reaching out to Key Opinion Leaders and other stakeholders such as patient groups. We have a mutual interest in this area and we know that just having a product won't cut it, so we need to develop additional services and solutions, and we would like to do that with them." According to Debraj, this way you can get early buy-in and also test ideas early, kill the ones that don't work and selectively invest in areas that have the potential for success.

Highly specialized treatments in the areas of specialty and orphan diseases are a good illustration of where the potential for co-creation exists. For successful uptake of innovative medicines that target highly complex diseases you often need the right diagnostic tests and biomarkers that will identify the subpopulation of patients who will benefit most from that treatment. Similarly you may need to invest in pre-treatment testing to confirm patient eligibility or even carry out other tests during the treatment duration to ensure optimal outcomes while minimizing side effects from the medication. Data to inform the creation of the above services and solutions can be collected at hospitals which are already committed to tracking exactly how each patient responds to each treatment in the effort towards improving patient outcomes.

"You need to truly understand what the patient journey is like and what kind of support is needed."

In addition to solutions and tests supporting diagnosis and optimum treatment selection, adherence is another big area where tailored services can play an important role in improving health outcomes.

Comprehensive solutions support patient adherence e.g. through call centers that offer guidance, advice and reminders or even nurse support programs that can outreach into patient's homes. Here, patient experience and a continuous feedback loop is key to finding the right solutions.

"You need to truly understand what the patient journey is like and what kind of support is needed..., just throwing another website, app, or SMS reminder out there will not do it... which is why many adherence programs have failed," Meike commented.

'Patient journey' is a critical starting point and the foundation for understanding where the patient experience is sub-optimal. To get to a comprehensive view of the patient journey one must understand the complex set of processes that individuals go through when first faced with a diagnosis, right through until treatment and stabilization/cure.

First, there's the physical journey, which typically starts with the first symptom, leads through consultation with a physician, a referral to a specialist, and ends at the pharmacy. The referral step is one that

often carries a high risk of discontinuity due to for example diverse requirements for patient information, lack of communication or the neglect of patient concerns. Services like for example doctor discussion checklists, patient diaries or online consultations can support patients in navigating these various touchpoints.

Then there's the emotional journey, which captures the experiences and emotions of newly diagnosed patients and explores the realities of living with a particular disease. Especially in disease areas like cancer, services like nurse navigators, peer-to-peer platforms and caregiver support can contribute substantially to improved patient outcomes.

Third, there's the financial journey, which requires identification of the reimbursement pathway - who pays for which treatment and tests to ensure that there are no financial coverage gaps within the healthcare system. In some markets, US services like benefit investigation, co-pay assistance and alternative coverage are already becoming a standard offering from pharma especially with high priced specialty drugs.

“Mapping the patient journey is a challenge, particularly for global brand teams, as there's no one global patient, but if you skip that and just jump to a solution, there's a risk that patients will not use it,” Meike added stressing that patient journeys must be well-understood in an effort toward identifying any points of inefficiency and confusion that, if properly addressed, will

allow pharma to contribute to achieving better health outcomes at costs lower than those presently incurred.

Getting more involved for the sake of better health outcomes is an opportunity for pharma to get a competitive edge. In the future one can imagine Payers that are likely to favor manufacturers who not only deliver the right medicines, but are also concerned about adherence, as non-compliant patients are a source of significant losses within the system. Some pharma companies are starting to include specific services and adherence programs already in the development phase in order to be able to prove better outcomes through the combined offering and overall savings to payers and thus demonstrate value in a much broader way.

Meike concludes, “This is not just about finding a new model for pharma, because the old one is broken... With all the knowledge they have on disease areas, healthcare systems and the different stakeholder groups, pharma is well-placed in the healthcare industry to take advantage of this opportunity, and position themselves within the system, not next to it.”

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*Published on:
<http://social.eyeforpharma.com>*

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