

Practical Patient Centricity



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Putting customers at the centre of businesses is common practice in many industry sectors. Though the pharmaceutical industry has multiple customers, including healthcare professionals and payors, the ultimate customers are always patients. For many in the industry however, embedding the views of patients across the value chain is stuck at strategic intent rather than a practical reality that guides decision-making. Our experience with a number of pharmaceutical companies highlights a range of approaches to this challenge, and in this paper we explore ways in which some are changing their business models to move from worthy words to Practical Patient Centricity.

Almost all industries are customer centric. They gain a deep insight into what matters to their customers, what they look for in a product or service and what they are prepared to pay to receive it. Companies then invest in sales and marketing to ensure that their product is the one that is purchased ahead of competitors.

In principle, the pharmaceutical industry is no different. Whilst its customers can be considered to be healthcare professionals (HCPs), or even governments, the ultimate true 'customer' is the patient and by addressing unmet medical needs, lives are improved and extended. However the practical reality is that for many companies, customer, or patient centricity remains limited to words on mission statements, rather than the day-to-day activity. Through our work across the pharmaceutical value chain, we find

that executives almost always agree with the goals of patient centricity, but the daily pressures and processes of their roles constricts them in making it happen. The reality is that the patient is infrequently or never consulted at key points in the development of medicines – as one executive described it:

“The idea of talking to a patient about their medicine is alien to us”.

It is not just company strategy and intent that is the driving force for a more patient centric approach: external pressure is also building for the industry to change. The British Medical Journal requires companies to indicate the level of patient involvement in manuscripts for example. Should the FDA require patient input to be included in trial design, then companies will be forced to adapt rapidly and bring the patient’s perspective into the development of medicines.

Why patient centricity matters

A strong rationale for why patient centricity matters is the foundation from which companies can begin to embed the views of the patients across the value chain. In our experience, companies typically have three key reasons to embrace patient centricity:

1. Patients are more knowledgeable than ever

Healthcare is evolving from being paternalistic to discursive, with patients having greater choice than before. When diagnosed, patients frequently seek information online to enable informed discussion with their healthcare professionals. Companies that understand this ‘choice agenda’ can provide relevant information to patients and engage them early in their treatment options.

2. Companies can develop therapies that have a greater impact on patients

Most patients just want to be better – mode of action, robust clinical trials and health economic models are not relevant to them (but are to payers and HCPs). By understanding what really makes a difference to a patient’s life, companies can explore therapies that meet these needs, rather than developing drugs that are simply different or novel.

3. Drug development costs can be reduced

Patient-derived data drives the development of medicines. Patients frequently are not forthcoming with their experiences of a condition, with the potential loss of valuable data that could improve a development

programme. Cost effective wearable technology can gather this data, enabling the ‘silent patient voice’ to be heard – coupled with regulatory changes, clinical trials can be shortened and costs reduced.

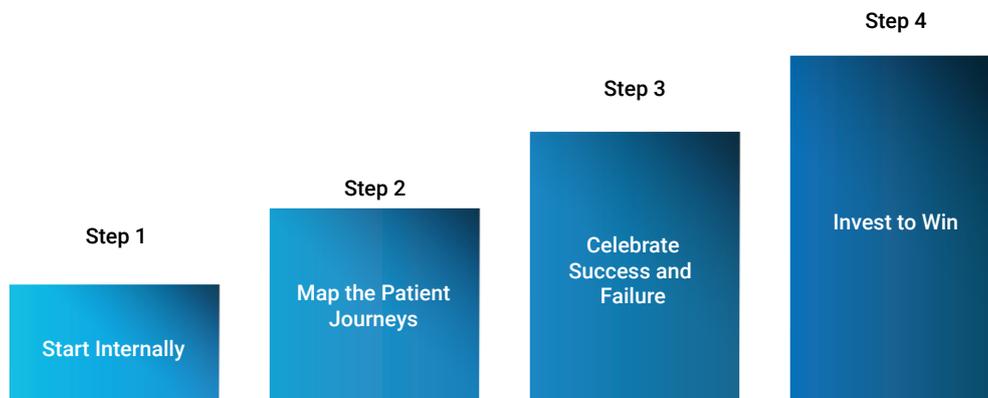
Companies such as Merck & Co, Sanofi and UCB have identified the competitive advantage that patient centricity brings and are leading the way in its practical implementation. Given that this is a relatively new area for the industry, there has clearly been a degree of trial and error, but there are already signs of what works and what doesn’t – for one executive:

“Patient centricity is the next market access – and will take 10 years to embed”.

Steps towards Practical Patient Centricity

There are four critical success factors for embedding patient centricity, each with some important ‘watch-outs’ to be aware of.

Practical Patient Centricity requires a systematic, consistent and stepwise approach.



Start internally

Though patient centricity is ultimately externally facing, companies should initially focus internally to achieve gains. Appointing a senior accountable individual, such as a Chief Patient Officer is an example of an important first step. By doing so, commitment and investment is demonstrated. Clearly commitment must start at the very top, but the real work starts at the level of senior management. Combined with strong internal communication, employees can and should be engaged early in the process.

Map the patient journeys

Most employees are not patients for the condition they work on – engaging with them on what it is like to have the condition is critical for patient centricity to stick. Employees from across the value chain can work with patients and patient groups to map the patient journey from being well to getting treatment and beyond, to help understand the impact of the condition. Once completed, both improvement opportunities and points of failure where companies can add value can be identified and explored. These may be outside the current scope of the company's business, so a robust decision framework needs to be implemented to prioritise appropriate actions.

Celebrate success and failure

There is no definitive way to embed patient centricity, so new approaches will create both successes and failures – both should be embraced and shared widely. It is highly likely that new opportunities will present challenges to existing processes and practices, particularly in legal and regulatory spheres. An open minded, 'can do' mind-set enables gains to be achieved, with acceptable levels risk embraced.

Invest to win

Patient Centricity is like other transformation initiatives, requiring investment to win. Companies should commit time, money and people to patient centricity over a minimum of five years, as genuine change like this requires a medium term horizon to achieve successfully. Leaders also need to calibrate their definition of success to incremental gains, rather than big leaps forward. Agreeing and tracking measures that are key in the patient journey, rather than traditional 'return on investment' metrics mitigates against early termination of relevant initiatives.

Why patient centricity can fail

Though well intentioned at the outset, patient centricity efforts can stall or fail – here are the top three from our experience:

New against old

Patient centricity activities receive greater scrutiny than current programmes and can often be strangled at birth. Leaders must accept that like any other new initiative, patient centricity will take time and requires nurturing in the early days to increase the chance of success.

Limited practical guidance

Companies engage employees on an emotional level (patient centricity is the 'right' thing to do) but fail to provide practical guidance on what to do to – employees can default to old habits, rather than embracing new approaches. Providing employees with a decision framework and 'guard rails' enables choices to be made at all levels. Patient centricity should be emotionally grounded, but rationally led.

Jumping to solutions

Solutions to patient problems that don't exist or are not well defined can waste time and effort and lead to disengagement. Deeply understanding the patient journey and engaging all employees across the value chain mitigates against this.

The future of patient centricity

Patient centricity is being adopted across the pharmaceutical industry with varying results. Companies that take a structured, rigorous approach that engages employees across the value chain and welcomes both success and failure are seeing the biggest rewards so far. However our experience shows that companies like this are in the minority. For those yet to embrace patient centricity, the greatest barriers are internal, but there are external pressures that are increasingly meaning it is a question of if, not when, patient centricity takes centre stage.