

**RISING TO THE
OCCASION:
WHAT PATIENT
CENTRICITY MEANS
IN LIFE SCIENCES
AND HOW TO
ACHIEVE IT**



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In the past few years, the business model that's been the bedrock of the pharmaceutical industry — discovering new drugs and commercializing them profitably — has shifted, with growing numbers of industry stakeholders now investing in patient centricity.

In 2018, a global survey of pharmaceutical executives found that **86% ranked delivering on a patient-focused vision among their organization's top priorities.**

Today, it's more important than ever for biotechnology and pharmaceutical companies to move in this direction, but that doesn't mean that becoming patient-centric is easy. It involves a fundamental transformation that spans business models, company cultures, ways of collaborating, and digitization. This isn't a small change, and it's becoming unavoidable.



WHAT DOES PATIENT CENTRICITY MEAN IN LIFE SCIENCES?

Patient centricity integrates listening to and partnering with patients. It places their well-being at the core of all initiatives. A patient-first mindset should be reflected across the company's operating model and woven into corporate strategy from the top down. **It means offering products and services that benefit patient health while striving to better understand patient needs through a ceaseless feedback loop.** It also means strengthening and building trust in that relationship by making use of the right processes, technology, data, and talent.

DIFFERENT CONDITIONS, DIFFERENT DEMANDS: THE NEED FOR PATIENT CENTRICITY IN LIFE SCIENCES

First, the very nature of drug development is different today. There are far fewer blockbuster drugs (defined as a drug with over \$1 billion in annual sales) than there were even a decade ago, while many patents are set to expire. Nine of the industry's top 20 drugs by sales will face generic competition by the end of the decade. As science advances and the ways that care is managed and delivered shift in response, the industry is moving toward more personalized approaches to treatment. Interest in novel cell and gene therapies — targeting a small and specific segment of the patient population, or even an individual patient — continues to climb. Developing these treatments requires a far deeper understanding of patient needs, circumstances, and priorities than creating a new molecule for the mass market.

To be effective, these therapeutics also require patients to comply with more elaborate and complicated protocols. Novel cancer treatment regimens, for example, can include multiple blood draws and infusions, as well as bridging treatments and coordinated chemotherapy.

“Because these treatments have to be administered in a certain way, and patients have to adhere to complex schedules and treatment protocols for the therapy to be effective, **success requires a better understanding of how the patient will interact with the treatment.** It’s critical to consider the economic and social factors that drive patient behavior. You also need to look at comorbidities. Many patients are managing more than one disease, which has a major impact on their overall health and the outcomes a treatment can deliver.”

SIDDHARTHA SHARAD

Director, Advisory and Transformation at West Monroe

Furthermore, healthcare reform is driving an ongoing transition from fee-for-service payment models to outcome-based models. With this move to value-based care, growing numbers of private insurers are tying medication reimbursements to care outcomes. Payers are increasingly interested in entering into risk-sharing agreements with pharmaceutical companies, which can reduce the cost of new therapeutics while strongly incentivizing pharma to monitor and invest in patient welfare.

If all that weren't enough, big tech is continuing to make forays into the healthcare marketplace. Much of this market's growth over the next decade will come in the form of innovative healthcare adjacencies, and the tech giants are competing with major pharmaceutical companies to disrupt this space, particularly with digital capabilities and platforms aimed at healthcare's many gaps and inefficiencies. It's estimated that companies such as Apple, Google, and Amazon have nearly three times the cash on hand to invest in digital health initiatives than pharmaceutical companies, as well as far more experience managing, analyzing, and extracting value from data.

It's an often-noted fact that today's patients are becoming more engaged with their own healthcare. While our present aim here is not to analyze the reasons why this is and what "engagement" means in this context, suffice it to say that patients are facing considerably more choices than they have in the past – what doctor to see, which drugs to take, where and how and when to receive care, etc. This goes far beyond responding to direct-to-consumer drug advertising.

“Personalized medicine,” for instance, means more than care plans and genomics; **it also means online research and efforts to seek out care that aligns with a given patient's values and evolving needs.**



Healthcare consumers are much more digitally savvy than they were even a few short years ago, making them more able - and willing - to participate in remote patient monitoring, health and fitness wearables, or engage with health-related mobile apps.

When you bring all these factors together and look at them holistically, they clearly spell the need for patient-centric approaches that enable pharmaceutical companies to deliver personalized services, solutions, and experiences across the entirety of the patient journey. This kind of enterprise-wide operational and technological focus on “the patient” will allow life sciences organizations to better engage today’s healthcare consumers and gain greater insights into their needs. Ultimately, this has the potential to improve outcomes, drive greater revenue, and add value for patients and caregivers alike.



BENEFITS OF ADOPTING A PATIENT-CENTRIC APPROACH

- Increase drug awareness and drive therapy adherence.
- Reduce the burden of disease for patients and caregivers.
- Collaborate to alleviate provider workforce challenges.
- Play a greater role in patient education.
- Gain more direct access to patients (as well as the data that's created during these interactions).
- Leverage technology to enrich patient-engagement strategies.
- Strengthen relationships with patient support and advocacy groups as well as caregivers.
- **Reduce costs to the organization and to patients.**
- **Drive profitability in a world where blockbuster drugs are no longer a major revenue source.**

BECOMING A PATIENT-CENTRIC LIFE SCIENCES ORGANIZATION

Though pharma decision-makers recognize the importance of these initiatives, they often still struggle to translate that to the business. This is partly due to the fact that becoming a patient-centric life sciences company is a sweeping change: "Patient-centric" is something you become, not something you do. It requires a shift in perspective, but it's also a matter of building a patient-focused engagement model, reorganizing patient service programs, digitizing delivery models, and creating experiences that speak to and spotlight the patient.

"If you talk to top-level executives in the industry, you'll see that they clearly understand the need for patient centricity. From a strategy and vision perspective, they have the right intent. But translating that intent into real changes and executing those changes — that's where most pharmaceutical companies are struggling."

SIDDHARTHA SHARAD

Director, Advisory and Transformation at West Monroe

Sustaining change over time is a difficult task — mindsets need to shift, which takes time, and behavior needs to change, which also takes time. It's imperative to have the right incentives, the right leadership and the right vision, along with executive support for that vision. And the importance of clearly defined measures of success that correlate to the bottom line cannot be overstated, as that's how the organization will avoid the pitfall of soft measures that sound good on paper but don't actually translate into stakeholder and shareholder value.

To help navigate all this, we've reduced the transformation to patient centricity in life sciences to four main areas: **organization-wide operating models; cross-enterprise and ecosystem collaboration; patient journey management and transparency; and continuous improvement of core competencies.** Let's look at each of these more closely.

ONE.

ORGANIZATION-WIDE OPERATING MODELS

Historically, most life science companies have operated in a brand-centric model, meaning that commercialization and patient engagement were driven from the perspective of the brand rather than holistically. But today, patient centricity needs to be organization-wide.

The foundation for this sort of operating model shift is a shared understanding of strategy, goals, and objectives. Leadership needs to understand what patient centricity means to them, what “digital” means, what they want to achieve in the near term, and what appropriate measures of success are. This common vision can be a starting point for building a digital roadmap and executing against it.

“Pharmaceutical companies need to look at digital not as a capability but as a way of being. It needs to be part of your organization’s DNA.”

SIDDHARTHA SHARAD

Director, Advisory and Transformation at West Monroe

This sort of holistic transformation requires buy-in from leadership and should extend to enterprise-wide efforts. To lead those efforts, many life science companies engage a Chief Patient Officer (CPO) to work across the entirety of the business, linking all parts of the organization together and reporting, in most cases, to the CEO. In the past, functions such as research and development and commercialization were always performed by different groups with different ways of doing things and — sometimes — conflicting objectives. The CPO’s job is to bring these different parts of the organization together so they can work in unison.

In some companies, the chief digital officer or chief transformation officer can serve the same purpose. Ultimately, though, the title itself is secondary to the function; it’s the coordinating, strategic role this person plays that matters, particularly as it relates to the deployment of technology in the service of an adaptive, resilient, digitally-enabled organization. Someone in the organization has to own this and champion the notion that technology is clearly important to patient centricity, but only as an enabler. It’s not the end-all, be-all of transformation. Instead, technology needs to be viewed from the outside in, focusing on patient needs first and then building the right tools, platforms, and capabilities to meet those needs, all within an organizational structure and operating model designed for sustainability and innovation.

TWO.

CROSS-ENTERPRISE AND ECOSYSTEM COLLABORATION

Complexities persist to a greater degree in healthcare than in most other industries. Multiple independent parties play significant roles in any given patient journey, technology vendors and contractors are increasingly involved in key operational processes and government agencies regulate treatments' safety and efficacy.

In addition, patient advocacy groups and community organizations are increasingly driving patient education and awareness. With all these moving parts, collaboration is critical to aligning stakeholders around the prioritization of patient needs.

“The rise of value-based care has increased the incentive to collaborate in healthcare. The patient is the one who takes the medication, but not the one who decides which medication to take. And they’re not the one who pays for the medication. **There are three stakeholders whose input has to be balanced — the party that pays, the party that decides and the party that takes the drug.** For value-based care to work — and drive better outcomes — all three parties have to collaborate effectively.”

CORTNAYE SWAN

Partner, Healthcare and Life Sciences at West Monroe

When improving treatment outcomes is the top concern (as is the case in value-based care), stakeholders are no longer incentivized to simply seek the lowest-cost therapy. Instead, preference will be given to the therapy that provides the best outcome and managing adherence will play a critical role in achieving that outcome.

“In order for a therapy to work, people have to take it. The better you can educate patients on how to take it, the better their outcomes will be. In the current healthcare landscape, providers are operating with constrained resources. **If pharmaceutical companies can partner with providers to educate patients, this will benefit everyone.**”

CORTNAYE SWAN

Partner, Healthcare and Life Sciences at West Monroe

And it's not just about providers and payers. Life sciences companies can benefit from forming new partnerships with other industry participants like diagnostics companies, technology companies, and other service providers. Doing so is an essential part of the recipe for patient centricity because it keeps drug developers close to patient communities and sites of care in ways that can directly impact and influence treatment efficacy, costs, and medication adherence through better education and communication. Doing so also makes it possible to gather the data needed to continuously refine products and services.



THREE.

PATIENT JOURNEY MANAGEMENT AND TRANSPARENCY

Creating services that address patients' needs across all stages of their care journeys requires that life science companies meet patients where they are. Increasingly, this means engaging them across a wide variety of channels — including portals, digital care management tools, nurse and general call centers, chatbots, email, text messaging, and even paper mail. Although healthcare is uniquely complex, this is still customer journey management 101, and it's not terribly different from customer journey management in other industries.

What is different, though — and what must be accounted for and maintained in seamless conjunction with apps, portals, systems, and tools — is the human element. This is where the earlier point about tech-as-enabler comes back around. The technologies a life sciences company employs to advance and provide access to its products and services must be complementary to the direct human connections that are inextricably part of care delivery and management. This means understanding that technology will never replace human connection and “offline” interactions, so it must serve to enhance relationships, not act as a constraint. To this end, ease of use and convenience will always be key.

To help patients feel a natural progression as they move through their care journeys, the channels in which they interact with pharma companies must be interconnected and complementary. They should be built considering the end-to-end patient life cycle as a unified whole. Achieving this requires answering questions like:

- **What are all the various points at which we interact with patients?**
- **What are their needs at each of these points? Across the entire life cycle?**
- **How do our interactions address these needs? How are the needs being met currently, and how will they be met in the future?**
- **How do we measure success at each of these points?**

The final question on that list is very important, as effective measurement is key to a sustainable patient-centric model. Pharmaceutical companies need to track the right key performance indicators (KPIs) across the patient journey. They can do so by implementing digital tools and technologies that will give them greater insight into effective drug use and impact on patient experience and health outcomes.

They should also develop and implement digital products and platforms that can provide patients with accurate information about the conditions that their therapies can treat, answer questions, and help patients manage in-person and virtual care. Such tools can include an integrated patient portal, companion apps and wearables, and digital logs, among other technologies that enable monitoring and measurement of the patient journey.

▶ **Flip to the next page for the basics of how to establish effective measurement.**



FIVE WAYS TO MEASURE PATIENT EXPERIENCE

1. Create patient and caregiver journey maps.
2. Create capability maps to assess which capabilities are needed to support these journeys.
3. Track patient feedback in ways that are both quantitative and qualitative.
4. Examine cost and access metrics.
5. Develop and track medication adherence KPIs.

FOUR.

CONTINUOUS IMPROVEMENT OF CORE COMPETENCIES

Becoming patient-centric requires ongoing transformation and endless competency-building across the entire organization. Everything must be viewed through a transformational lens. This shift requires a deep investment in change management and the creation of a network of change champions.

This is very different from how pharma has traditionally done things. Traditionally, life sciences companies have operated from the perspective that every drug is special and unique, and so is every brand. In that mode, every drug launch is approached as if it's the first time it's ever been done, so there's very little repeatability in operational processes.

“Oftentimes, when a pharmaceutical company wants to be future-facing or forward-looking,” Swan explained, “they’ll hire someone from outside the industry to fill a role like that of the Chief Digital Officer. But the uniqueness, the complexity and the extremely large amounts of data involved continue to present challenges, especially when you’re thinking about areas like oncology and rare disease therapeutics, for example.”

CORTNAYE SWAN

Partner, Healthcare and Life Sciences at West Monroe

Moving toward a culture of continuous improvement is among the core practices that make up an agile way of working. Implementing agile practices can help pharmaceutical companies become more flexible, nimble and, adaptable — traits essential for success in a digitally transforming world and rapidly evolving business climate.

Pharmaceutical companies are collecting enormous amounts of data today, but that data will be largely academic if feedback loops aren't closed. **Questions like "How are we using this data to improve patient experiences? Are we leveraging it to better understand patient journeys and/or make changes to our products?" are essential to closing that loop and deriving real value from data.**

Consider a therapy that's administered by injection, for example. Patients are struggling with adherence because the injection stings. So the manufacturer acts on this information and adds a topical numbing agent to the antiseptic wipe included in the packaging. This is closing the feedback loop and making continuous improvement.



HOW AGILE THINKING ENABLES PATIENT CENTRICITY IN PHARMA

Agile was traditionally considered an IT-centric philosophy, but it's now used to transform nearly every aspect of operations and customer experience across multiple industries — including healthcare. The agile approach stresses the importance of building a minimal viable product. In pharma, as everywhere else, this means **making small changes, driving quick wins and then collecting feedback from patients that teams can learn from and integrate into their next steps.**

When it comes to patient centricity, agile ways of working and well-planned change management strategies can enable a quantum leap forward. But the right focus and energy must permeate the organization if enterprise-level transformation is going to take place. And achieving patient centricity cannot be viewed as anything less than that.

CONCLUSION: **ENABLING PATIENT CENTRICITY AT SCALE**

Between rising competition from new market entrants, the fading of the model of commercializing blockbuster drugs and the shift to value-based care, there has never been a better time for pharmaceutical leaders to reimagine their operational models to prioritize patient experience. In a world where precision medicine and personalized therapeutics are becoming more and more common, each individual patient's data is being used as a blueprint for their treatment. And new technologies and communication channels promise to improve long-standing medication adherence challenges.

Realizing the full promise of patient centricity in pharma requires transformative change, though — the kind of change that isn't easy in a highly regulated industry with well-established operational processes. At West Monroe, we help pharmaceutical industry leaders harness their energy and focus to accomplish DNA change at enterprise scale. This shift involves digital transformation and cultural change in equal measure. It demands putting the patient's needs front and center everywhere, from clinical trial protocol design to post-market data collection to pre-launch planning. The blueprint we've put forth here is how to start.





West Monroe is a digital services firm that was born in technology but built for business — partnering with companies in transformative industries to deliver quantifiable financial value. We believe that digital is a mindset — not a project, a team, or a destination — and it's something companies become, not something they do.

That's why we work in diverse, multidisciplinary teams that blend management consulting, digital design, and product engineering to move companies from traditional ways of working to digital operating models — and create experiences that transcend the digital and physical worlds.

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