Prioritizing Patient Services Portfolios

July 2021

Thinking Breakthroughs

What are
Patient Services?

Patient services/support programs enable pharmaceutical companies to wrap services around their leading-edge therapies, in order to:

- deliver superior patient outcomes

- drive differentiation

- strengthen patient and healthcare professional (HCP) relationships

These programs will play a key role in determining success of treatment products in the future.

Why
Patient Services?

- Augment the therapeutic pathway to improve patient outcomes

- Drive differentiation and improve trust with patients and HCPs

- Build a platform to take the treatment to scale at an optimal cost

Patient Services market overview

US Patient Services Market Size ($B)

Year	Value
2017	$2,9
2018	$4,1
2019	$5,3
2020	$6,4
2025	$12,3

CAGR: 19.5%
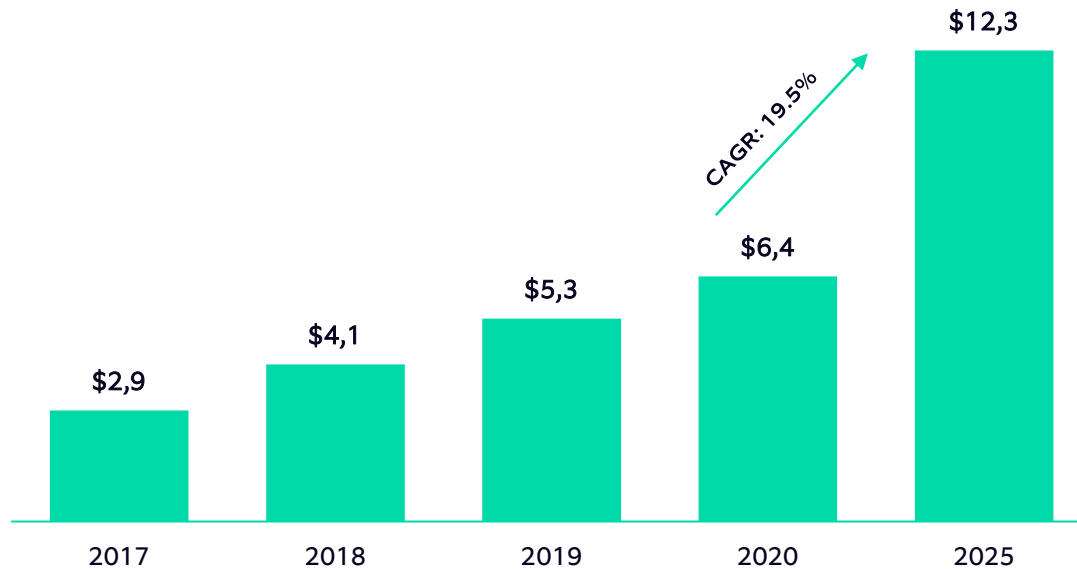
In 2019, the global **Healthcare IT** market size was valued at **$67.5B**

In 2019, the global **Patient Services** market was estimated at **$11.8B**

Sources: Grandview, Research and Markets, PR Newswire, Accenture, Grandview, Grandview

76% of patients believe pharmaceutical companies have a responsibility to provide services that complement their products

19% of patients are aware of the services that pharmaceutical companies offer

85% of pharma companies are raising their investment in patient-centric capabilities

40% of healthcare professionals are very aware of patient services offered by pharma companies

84% of patients believe that pharma companies should be working more closely with patient organizations to create a seamless patient experience

Various types of Patient Services

Caregiver Access

- Virtual Care/Telehealth
- Remote Monitoring
- Healthcare at Home
- Patient Transportation
- Health Coaching

Healthcare Financing

- Electronic Prior Authorization (ePA)
- Benefit Coverage (BI/PA/Appeal)
- Co-pay Assistance
- Alternative Coverage/PAPs
- Reimbursement Support

Self-care/Compliance

- Patient Education/Discovery
- Medication Delivery/Support
- Adherence and Refill Tools & Programs
- Reward/ Incentive Tools & Programs
- Social Health/ Emotional Support

Caregiver Access Services

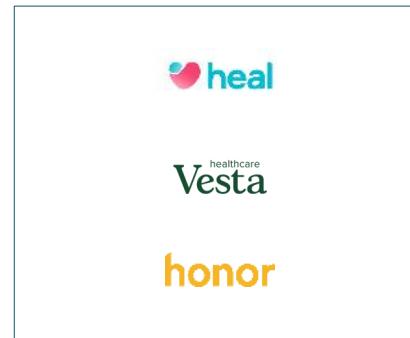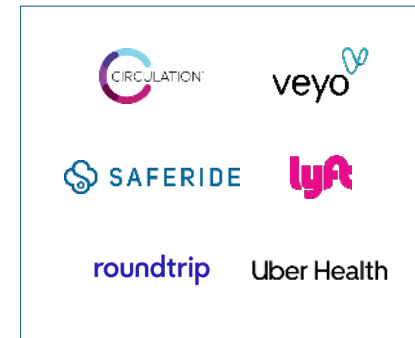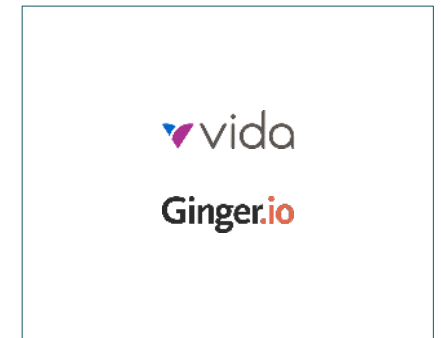| Virtual Care/Telehealth	Remote Monitoring	Healthcare at Home	Patient Transportation	Health Coaching
Enabling remote delivery of healthcare services through telehealth platforms	Monitoring of patients outside conventional clinical settings thereby increasing access to care and reducing costs	Supportive care provided by medical professionals at the patient's home to promote, maintain or restore health	On-demand and non-emergency medical transportation services offered to patients and healthcare consumers	Solutions related to disease management, behavioural or clinical assessment techniques and health education/training to improve heath outcomes
Teladoc HEALTH, MeMD, amwell, LiveHealth ONLINE, MDLIVE, virtuwell	Dexcom, SONDE, Medtronic, resideo, Senseonics, ResMed	heal, Vesta healthcare, honor	CIRCULATION, veyo, SAFERIDE, lyft, roundtrip, Uber Health	vida, Ginger.io

Healthcare Financing

Electronic Prior Authorization (ePA)

The electronic transmission of information between the prescriber, and payer to determine whether or not the PA is granted

Real-Time Benefits Verification

Enable providers with visibility into patient benefits, determine if a PA is needed, patient OOP cost and patient's preferred pharmacy

Co-pay Discounting

A drug discounting aggregator, offer coupons by drug companies or provide negotiated prices leveraging their bargaining power

Minimizing OOP burden through PAP

Enable patient access to PAPs by providing detailed information about assistance programs and supporting onboarding process

Patient Lending Platforms

Patient financing schemes to help breaking down the deductible cost into smaller instalments, can have large impact of adoption and adherence

Reimbursement Support

Services remove barriers to successful payment of claims and provide a resource for patients with coverage-related questions

Self-care/Compliance Solutions

Patient Education	Medication Delivery/ Support	Adherence and Refill Tools & Programs	Reward/Incentive Tools & Programs	Social Health/ Emotional Support
Enable healthcare professionals and physicians to impart knowledge to patients, thereby altering their health behaviours	Enable timely delivery of prescriptions at patients doorstep/ convenient location to drive long term adherence through convenience	Enable patients comply with treatment regimens provided by physician, especially for chronic conditions requiring long term therapy	Enable customers to build loyalty by introducing incentives for ongoing purchases and driving adherence	Solutions to support patients with emotional wellness and address specific SDOH leading to deterioration of health outcomes

Growth drivers in Patient Services

Greater focus on value and outcomes

Life Sciences organizations are under pressure to justify their pricing and to prove that their drugs can improve treatment outcomes.

To achieve this, these organizations now not only offer patients the right treatment, but also support them throughout their treatment journey.

Growth in availability of health data

The amount of medical data generated every year is rising exponentially.

Technological advances are helping companies retrieve patient information.

Sources like electronic medical records, claims and billing information, big data from wearables or social media helps companies understand the quality, efficiency, and safety of their treatments.

Shift from reactive to proactive consumer

Patients today take a more active role in managing their own health.

They have access to more information than ever and search for symptoms, available treatments, and options before choosing a provider.

Rise of Personalized Medicine

With growth of specialty drugs and personalized therapies, demand for individualized treatments is increasing.

However, personalized medications are difficult to access or adhere, often leaving patients untreated or undertreated.

These challenges mandate organizations to reinvent their patient services models.

Patient Service program initiatives by pharma companies

360° patient service programs	AMGEN AstraZeneca	**Amgen Assist 360** provides several support services for insured, uninsured, and underinsured patients who encounter financial hardships. **AstraZeneca's Access 360** program provides assistance with understanding patient insurance coverage & pharmacy options, prior authorization, and claims & appeal process
Program evolution in post-COVID era	Bristol Myers Squibb Lilly Genentech *A Member of the Roche Group*	Pharma companies are rethinking on how to deliver patient support experiences that resonate with patient's today's new normal For example, in response to COVID-19, Eli Lilly and Company introduced the Lilly Insulin Value Program, allowing patients with commercial insurance and those without insurance to fill their monthly prescription of Lilly insulin for $35
Innovative patient engagement apps	BAYER MERCK NOVARTIS Pfizer	Multiple pharma companies are engaged in bringing innovative patient engagement apps to enhance the care delivery for patients For example, Merck's ChemoDiary app is focused on cancer patients undergoing complex chemotherapy. Pfizer's LivingWith app tracks, monitor and document real-time activity data

Innovative adherence technology solutions

Pillsy designs and markets smart medication packaging and mobile applications to help patients manage and improve their medication adherence .

Providers, payers, pharmacists and researchers can use the Pillsy web app to manage medication adherence for populations of patients.

MedMinders' automatic pill dispenser that reminds users when it is time to take their medication through flashes, beeps, text messages & phone calls.

It also provides the caregivers with notifications about patient's dosage activity, which can be monitored remotely through patient profile's on MedMinder's website.

Insightfil instruments medication convenience packaging with a proprietary NFC tag that can be read by smartphones by simply tapping the empty medication packet to it.

Insightfil collects valuable data – including whether the packet has indeed been opened – that can keep the patient and their circle of care informed of their progress.

HealthBeacon Injection Care Management System is used by patients who self-inject medications at home.

It is digitally connected and programmed with personal medication schedules and uses customized reminders to help participants stay on track.

Sources: Pillsy, MedMinder, Insightfil, HealthBeacon

AI & Personalization in Patient Services

Patient Education Platform	ELSEVIER	**Elsevier** launched PatientPass that personalizes educational materials to fit a patient's literacy ability, language and format, and delivers it directly to their mobile devices. Clinicians can share evidence-based education to support patients' conditions and receive insights about patient consumption of the information, which helps clinicians better identify at-risk patients. Overall, the solution enhances the partnership between clinicians and patients, so patients are better prepared to effectively manage their own care.
AI to Analyze Data	GYANT AllazoHealth	**GYANT** chat-based products use AI to collect and analyze patients' medical history and helps patients navigate healthcare offerings. Within minutes, user receives a disposition, advice, or referral to the appropriate care setting. **AllazoHealth's** AI engine predicts patients who are at risk for non-adherence, selects the channel, content and timing to deliver the most effective engagement, personalized for each patient, optimizes the engagement over time to deliver continual improvement
Personalized Support	Catalia Health	**Catalia Health's** Mabu social robot learns about each patient's personality, interests, and treatment challenges over time and provides support. This enables Mabu to create conversations that are tailored to each patient and that resonate with their unique personality and circumstances. Conversation platform can be deployed through multiple interfaces including Mabu, mobile apps, text, and web.

Sources: Catalia Health

Prioritization framework for areas to invest

Rating	Ease of Execution	Investment in Infrastructure	Innovation Potential	Degree of Impact
Indicating attractiveness of the sector	Ease of developing this capability	Degree of investment required in physician infrastructure i.e., people, hardware, logistics, etc. which can act as an entry barrier	Degree of innovation possible in this area, based on understanding of unmet needs, recent innovation and lag presented by incumbents (if any)	Degree of anticipated impact on patient lives and ability for pharmaceutical organizations to improve health outcomes
○	Requires a long development cycle (12-18 months), establishment of critical mass of features and evidence around effectiveness of the service to drive adoption	Requires building logistics or acquiring heavy assets, and plus investment in a large team of people	Incumbent players already driving differentiation and having strong innovation pipeline	Limited impact on driving up medication adoption, adherence and hence health outcomes
◑	Requires a short to medium development cycle, but development of a net new capability (e.g., transport/delivery) to drive adoption	Requires investment in development a large team of people to enable this service	Incumbent players collaborating with start-ups / innovators, but areas of unmet needs exist	Some impact on driving up medication adoption and adherence, but hard to establish direct correlation with health outcomes
●	Requires a short to medium development cycle and does not require development of new capabilities	Requires minimal investment in logistics, heavy assets or people; can be enable through software and partnerships	Start-ups driving innovative ideas, but large incumbents stuck in historical business models	Direct impact on driving up medication adoption and adherence, and hence impacting health outcomes

Prioritization ratings for various Patient Services areas

	Patient Services	Ease of Execution	Investment in Infrastructure	Innovation Potential	Degree of Impact	Overall Rating
Caregiver Access	Virtual Care/Telehealth	3	3	1	3	10
	Remote Monitoring	5	3	5	5	18
	Healthcare at Home	1	1	3	5	10
	Patient Transportation	1	1	5	3	10
	Health Coaching	5	5	3	1	14
Healthcare Financing	Benefit Coverage (BI/PA/Appeal)	5	5	1	3	14
	Co-pay Assistance	5	3	5	5	18
	Alternative Coverage/PAPs	5	5	3	1	14
	Reimbursement Support	3	3	5	5	16
Self Care/ Compliance	Patient Education/Discovery	5	5	1	1	12
	Medication delivery/Support	3	3	5	5	16
	Adherence and Refill Tools & Programs	5	5	3	5	18
	Reward/Incentive Tools & Programs	5	5	3	1	14
	Social Health/Emotional Support	5	5	3	3	16

Legend: ● = 5   ◑ = 3   ○ = 1

Challenges with current Patient Services solutions

Siloed and uncoordinated

- Patient services programs typically are executed by multiple departments for multiple brands utilizing both internal teams and external partners leading to inefficiency and added costs

- As result, patient services providers can unknowingly approach the same patient with different programs, causing both confusion and sometimes offsetting the programs' desired effect completely

Lack of data governance

- Patient services data is often unstructured and lacking when it comes to data governance and stewardship

- Manufacturers too often leave data quality, format, and mastering to chance when receiving data from the patient services providers which causes many problems, including the inability to analyze the program's success

Challenge of program measurement

- Measuring patient services program effectiveness is often unstructured and lacks clear success criteria, manufacturers will utilize anecdotal evidence for program measurement with little or no control criteria

- It is uncommon for a manufacturer to establish and utilize formal success criteria for patient services prior to initiation and conduct ongoing measurement and evaluation of program goals

Cost ambiguity

- Generally, cost prediction is done at the aggregate level for multiple programs and in annual buckets; lack of visibility into costs for individual patient service

- Most manufacturers also typically do not have the ability to predict or trend costs for patient services. This means they are forced to react to actual cost changes and adjust budgets in real time

Fewer efforts on digitization

- Most manufacturers do not employ advanced analytics and prediction regarding their services programs and investments in this area

- Employment of AI/ML techniques to predict both risk and intervention strategy is underutilized and rarely deployed

Sources: Pharmaceutical Commerce

Recommendations for an effective Patient Services solution

#	Challenge	Solution	Key Takeaways
1	Siloed and Uncoordinated	Comprehensive solution	Develop a comprehensive solution framework that can enable different patient services, and integrate with the existing ones to allowing traceability and governance across programs
2	Lack of Data Governance	Interoperable data framework	Develop data standards and governance specific to patient services, which will allow interoperability of data for operational and monitoring purposes
3	Challenge of Program Measurement	Investment in data capture and analytics	Invest in data capture and analytical frameworks to enable continuous measurement of ROI; explore interlinking with claims data to ensure cost and ROI evaluation is more robust
4	Cost Ambiguity	Governance framework and KPIs tracking	Invest in governance framework and KPIs that enable tracking of true cost of patient's services at a company, disease and patient level
5	Less Efforts in Digitalization	Digitization & automation	Invest in automation of legacy patient services which have operated in traditional ways for very long (e.g., telemedicine driven counseling)

Let's get started!

Free 1-day exploratory workshop

Interested in learning more about the opportunities that Patient Services bring?

Schedule a **free workshop** to discover how Nagarro can help you develop a comprehensive Patient Services portfolio to improve patient outcomes, build trust between patients and healthcare providers, and enable you to create a platform to scale treatment at an optimal cost.

Get in touch!

We're happy to help with any questions

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We are excited for our next conversation.

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