

The Patient Journey

How are pharma companies providing patient support on the journey through therapy?

Patient starts here

72% of internet users look for health and disease information online.¹

Pre-diagnosis

Patient Challenge: Diagnosis can take time, multiple tests and visits to various physicians.

Support Services: Brands provide patient information to WebMD. The Mayo Clinic are where patients initially seek information.

Diagnosis

Patient Challenge: Anxiety, shock, fear, denial, confusion, no clear understanding of the diagnosis and treatment options, or how to talk to their doctor about it.

Support Services: On-line and offline patient education materials, discussion guides, and connections with support resources specific to their condition information initially.



76% of patients think pharma companies have a responsibility to provide patient support services.²

46%

of Americans say paying for medical care is a hardship.³

Obtaining insurance coverage

Patient Challenge: Navigating insurance is confusing and frustrating, therapy may not be covered or they may not be insured.

Support Services: Call center counseling, online support services, reimbursement support, provider consultant and support services.



31% of Americans say they've gone without medical treatment because of cost.⁴

46%

of patients tracking their condition say it has changed their overall approach to maintaining their health.⁵

Access to therapy

Patient Challenge: Treatments can be costly and out-of-pocket fees may prohibit patients from starting or continuing therapy.

Support Services: Patient assistance programs co-pay and discount programs to for part or all of their therapy.

Treatment

Patient Challenge: Significantly impacts patient's physical, emotional and financial state. Time constraints, family obligations, social stigma and work balance can be difficult to manage.

Support Services: Disease management tools and services, social media support information, peer-to-peer support and nursing.



Adherence

Patient Challenge: Adverse side effects, medication misuse and forgetfulness can cause patients to drop off therapy leading to failed outcomes.

Support Services: Medication and refill reminders, distribution services, nursing support for drug administration pharmacy counseling, transportation services to therapy centers.



Total cost estimates for non-adherence in the U.S. ranges from \$100 to \$300B each year.⁶

Patient Challenge: Staying healthy requires a behavioral commitment, as well as new and more productive relationships with healthcare stakeholders.

Support Services: Pharma companies have seized the opportunity to partner with patients, providers and payers to develop innovative approaches to keeping patients healthy.



76% of patients think pharmaceutical companies have a responsibility to provide information and services that help patients manage their own health.⁷



Bumps in the road: Is the journey a success?

The majority of patient access and support services are brand initiatives that provide isolated offerings to get patients through specific challenges they face along the journey. The experience is disjointed and often fails to have a meaningful impact on patients because there is no continuity in services. Very few companies are taking a strategic approach to patient services across their organization. It's time to take a closer look at how your organization as a whole can improve the patient journey.

A better path: How to improve the journey for your patients and business

- Align stakeholders around a shared vision to understand patients' needs and create a better experience
- Ensure tools and programs are aligned to solve a patient need while supporting a business objective
- Provide direction on where to invest time and money and which channels effectively target specific patients
- Assess the success of existing efforts (marketing campaigns, digital initiatives, vendor services) to maximize efficiencies
- Focus on key data points to make decisions

1. Pew Research Center, Internet Health Tracking Survey, 2013 <http://www.pewinternet.org/fact-sheets/health-fact-sheet/>
 2. Great Expectations: Why Pharma Companies Can't Ignore Patient Services, 2013, Accenture Life Sciences study with Coleman Parkes Research <http://www.accenture.com/SiteCollectionDocuments/PDF/Accenture-Great-Expectations-Why-Pharma-Companies-Cant-Ignore-Patient-Services-Survey.pdf>
 3. CBS News-New York Times Poll on Health Care Costs 12-18-14 by CBS News, <http://www.cbsnews.com/news/do-americans-think-their-health-care-costs-are-affordable/>
 4. CBS News-New York Times Poll on Health Care Costs 12-18-14 by CBS News, <http://www.cbsnews.com/news/do-americans-think-their-health-care-costs-are-affordable/>
 5. Pew Research Center, Internet Health Tracking Survey, 2013 <http://www.pewinternet.org/fact-sheets/health-fact-sheet/>
 6. Medication Adherence: Making the Case for Increased Awareness, Duke University Medical Center, and the National Consumers League, 2014, http://www.scriptyourfuture.org/wp-content/uploads/2014/02/NCLDuke_BriefingPaper_FINAL.pdf
 7. Great Expectations: Why Pharma Companies Can't Ignore Patient Services, 2013, Accenture Life Sciences study with Coleman Parkes Research <http://www.accenture.com/SiteCollectionDocuments/PDF/Accenture-Great-Expectations-Why-Pharma-Companies-Cant-Ignore-Patient-Services-Survey.pdf>