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Reimagining the SpecialtyRx Patient Journey Through the Lens of a Digital Consumer

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Since the onset of COVID, the world has seen a radical shift by consumers to digital channels out of both safety and convenience. This shift has occurred not just for everyday goods and services like online grocery delivery and digital banking, but also with big-ticket decisions — such as 30% of cars being purchased online (up from 2%), 30+ states allowing consumers to close the purchase of a home digitally, and $500B of personal wealth now being managed by "robo" advisors. Despite this seemingly permanent shift to digital-first experiences, the experience around complex diseases and getting specialty medications to the patients who need them remains stuck in an analog world.

THE STAKES ARE HIGH

32% Americans who suffer from complex, chronic or rare conditions

3% Overall prescriptions

Nearly **32%** of Americans suffer from complex, chronic or rare conditions, such as autoimmune diseases, genetic disorders or cancer, many of which require a specialty prescription therapy. These medications usually require special handling and dispensing, such as by injection, inhalation, or infusion. Despite being only **3%** of overall prescriptions, specialty medications represent nearly **50%** of the overall prescription drug spend in the U.S. For certain rare diseases, the time to diagnose these conditions can be 6–10 years, and one in four patients have affordability challenges in paying for prescription medications. In addition, **40%** of patients experience at least a two-week wait time to get on their medication.

While we moved to the on-demand economy in most sectors, many steps in the SpecialtyRx journey still require paper, faxes and phone calls. Once receiving a diagnosis and prescription for a complex therapy, many patients are often left to manage their own care, and both doctors and patients are frustrated by the lack of consistent and transparent communication at every stage of the complex care management process.

Patients who reported spending an hour on the phone coordinating care for specialty therapies

According to a CoverMyMeds survey, a majority (82%) of patients reported spending an hour on the phone coordinating care for specialty therapies, with more than a third spending at least three hours — not exactly the experience you would expect in a modern, on-demand world, where convenience and experience wins.

RAISING THE BAR – THE DIGITAL-FIRST JOURNEY

If we could suspend our beliefs of what's possible and the way things have always been, we could start from the needs and expectations of digital consumers and work toward what the SpecialtyRx journey should really be. Modern digital experiences should be immersive (any touchpoint), cognitive (use data to anticipate user needs) and trusted (responsibly leverage user data and be transparent on how this will create benefits for the user).

What if we used this expectation to design the future SpecialtyRx experience? The illustration depicts how each stage of the SpecialtyRx journey could be transformed using a digital-first approach as well as some of the companies setting consumer expectations for these different interactions.

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Transforming the SpecialtyRx Patient Journey

PATIENT JOURNEY	Awareness & Identification	Prescribing & Enrollment	Coverage & Access	Affordability	Shipping & Dispensing	Support & Adherence
CURRENT STATE	• Market to clinicians and influencers with potential patients via traditional field force and email campaigns.	• Clinician prescribes medication via fax to specialty pharmacy. • Clinician enrolls patient in a support program via printed forms or fax.	• Rely on phone calls to check pharmacy and medication benefits. • Prior authorization forms manually completed with clinician and submitted to payers.	• Determine co-pay or PAP eligibility and manually enroll patient in the program. • Paper-based co-pay claims submissions. • Manual tracking of co-pay limits. • No visibility of co-pay accumulators.	• Case manager triages the Rx, coverage and shipping details to a specialty pharmacy for dispensing and shipment to patient or facility. • Pharmacist reaches out to patient for counseling and education.	• Nurse calls patient to check in and see if they are on therapy or having any issues. • Nurse helps patient set up reminders and get access to education and advocacy resources.
DIGITAL- FIRST	• Use AI to target undiagnosed patients and those likely to switch with targeted messages through a wide variety of digital channels, including Patient Networks and Data-Sharing Platforms.	• Tele-connect with a clinician to get diagnosis and e-prescription. • Clinician auto-enrolls patient in support program via EMR with e-signature by patient.	• Use AI to estimate and fast-track patients with high PA likelihood. • Real-time electronic benefits verification and ability for HCP to see patient out-of-pocket costs before prescribing.	• Ability to determine co-pay eligibility and push card to digital wallet. • Self-service interactions via digital (e.g., mobile, web or chatbot) or human touchpoints for additional financial assistance.	• Automated shipment direct to patient or facility upon adjudication. • Auto or one-click reordering via e-commerce site. • Same-day or overnight delivery with real-time tracking via app or website.	• Patient and designated caregivers auto-enroll in digital concierge with personalized behavior change messaging, reminders and education with the ability to click-to-connect with nurse or coach via video or chat.

DIGITAL PROXY

Google · hims · SEPHORA · ROCKET Mortgage · credit karma · amazon · noom · acorns

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Awareness & Identification

Use rich health and lifestyle data and the power of artificial intelligence (AI) to find and match patients with trials and treatments; and use personalized digital engagement, education and advocacy to move these patients to action. Google sets the bar for this type of personalized, AI-based targeting.

Prescribing & Enrollment

The growing power of telehealth, combined with extended physician networks and e-commerce, provides an opportunity for both clinicians and manufacturers to deliver a simplified experience for patients. Also, the ability to provide digital enrollment at the point of prescription enables patients to afford and get their medication faster. Hims and Sephora are great examples of personalized, digital-first experiences that go from advivce to order in minimal time.

Coverage & Access

Patients want convenience but also may have complex financial and life situations that require a combination of both digital interactions and human support. Both patients and providers want real-time visibility of out-of-pocket costs, as well as convenient options for providers to submit electronic prior authorizations under both pharmacy and medical benefits. Rocket Mortgage has changed the paradigm in mortgage approvals and is raising customer expectations around real-time authorizations.

Affordability

Anticipating ongoing financial needs and providing consumer-like payment experiences and financial tools to help manage medication expenses is critical to keeping patients on therapy. This means making it easy for patients to understand and take advantage of any co-pay or assistance programs. Digital-first companies like CreditKarma are adding transparency and simplifying the process of managing credit scores and financing options for consumers.

Shipping & Dispensing

Patients are coming to expect same-day delivery and the ability to track the status of their medication shipments, whether it's to a clinic or their home. Amazon has redefined our expectation of same-day delivery from one-click ordering to delivery within the hour for many products by leveraging an AI-driven supply chain that anticipates and adapts to demand signals from the customers.

Support & Adherence

Today, many support programs and tools are "one size fits all" — when the reality is different patients and care circles are unique in their health-life journeys and needs. To drive sustained behavior change and keep patients on their prescribed therapy requires a truly personalized experience, with the optimal mix of digital and human interactions delivered at the right time, in the right context, via the right mode — tailored for each patient. Companies like Noom (behavior modification) and Acorns (financial planning) have created meaningful, personalized nudges that integrate into the everyday life journeys of their customers to drive positive behavior change and outcomes.

ROAD TO REIMAGINATION

Now that we have laid out the ideal journey and examples of companies delivering on this today, what will it take to get there? Several key success factors will be essential.

Courage to challenge the current paradigm

Not accepting that "specialty pharma is different" or "this is the way it's always been done" is the first step toward re-imagination. Ultimately, patients are consumers who want convenient, personalized experiences that anticipate their needs. They don't want to be reminded they are sick and certainly don't want to squander hours of their lives navigating archaic steps to get the medications they depend on. Companies willing to start with the lens of digital consumers are more likely to unlock the step-changes needed to transform the current SpecialtyRx experience.

Focus on user experience first and then on technology

For years, the industry has tried to transform healthcare through injecting new technology but has yielded only limited results because it failed to recognize the importance of the user experience. Digital solutions must integrate into the existing journeys or workflows of patients and providers to drive successful adoption. In the case of providers, digital interventions provided within the EHR workflow will see better adoption than those that require a separate interface or step. Similarly, in the case of patients, rather than asking them to

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download an app, having a conversation through secure text messages can be a simple but effective means of engaging them and reducing wait times, especially when combined with a patient portal for additional content and resources.

Marrying the best of digital + human interactions

As models like Noom, Stitch Fix and Sephora have shown, pairing the best of machines (AI) with the best of human advisors outperforms the best machines or humans on their own. This is no different in optimizing the interaction model for patients with complex diseases, but there are situations in which humans will excel in understanding the unique needs, emotions and life situations of patients and others in which digital experiences allow them to more immediately access what they need on their own.

Enabling patients to co-create their own journeys

Too often, companies think interviewing a few representative patients is enough to validate their current patient experience instead of viewing these experiences as dynamic, continuously evolving opportunities for patients to shape and influence their own interaction model. Sometimes just asking patients what they want to see in their own experience and adapting to this can provide a leap in personalization models versus trying to learn from scratch.

Starting with outcomes in mind

Every patient wants to get better, and clinicians want their patients to improve; but often companies lose focus of the end goal versus transaction metrics, such as patient enrollments or volume of prescriptions. Being able to engage patients and clinicians digitally along the SpecialtyRx journey enables companies to better learn and adapt to what will help propel each patient to a better quality of life given their condition and treatment plan. Whether it's knowing when to encourage exercise and diet versus when to promote relaxation and meditation, each patient's journey will be unique, and their definition of "good" will be their own. Helping patients define and better achieve their goals will be critical to keeping them on therapy and getting to the best health outcomes.

Creating new measures of success

Beyond improving adherence and better health outcomes (which are paramount), metrics — like speed to deliver, customer engagement/loyalty and overall customer delight — will matter a lot in the post-pandemic world. These are metrics typically found in consumer-oriented companies and will be adopted by progressive healthcare companies that are focused on delivering great experiences for their patients.

> "Despite all of the tragedy related to the pandemic, it has spurred a new wave of innovation and reset the bar on expectations for digital-first experiences in every industry, including healthcare. Specialty Pharma is no different, and companies that seize the opportunity to re-imagine the SpecialtyRx experience in a digital-first world will win mindshare and loyalty with the next wave of patients and clinicians. Most importantly: the value of getting more patients, many who live with debilitating conditions, the treatments they need at the speed of digital? Priceless."

About EVERSANA™

EVERSANA is the leading provider of global commercialization services to the life sciences industry. The company's integrated solutions are rooted in the patient experience and span all stages of the product life cycle to deliver long-term, sustainable value for patients, providers, channel partners and payers. The company serves more than 500 organizations, including innovative start-ups and established pharmaceutical companies, to advance life sciences services for a healthier world.
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