



EVERSANA™



RETHINKING PATIENT CENTRICITY IN A DYNAMIC MARKET ACCESS DRIVEN ECOSYSTEM

Understanding the complexities and interdependencies that deliver successful outcomes

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As the industry moves to a patient-centric, value-based care model, stakeholders across the continuum of care are focused on creating systems and solutions that put the patient at the forefront of decision making. This requires an alignment of priorities, such as patient engagement, HCP practice efficiency, and supply chain operations to achieve optimal market access and deliver outcomes that matter.

While the intent is clear, putting this into practice can be extremely difficult. Gaining and sustaining patient-centric market access requires deep knowledge of the roles that stakeholders play to drive value. A one-sized-fits-all solution will not work because 'all healthcare is local.' Local ecosystems have differing degrees of connectivity which are largely based on geography, hospital/provider consolidation, and payment models. They serve heterogeneous populations who have different chronic and acute care needs. Social determinants of health are real and inform how actively patients participate in their own care.

Research by Health Strategies Insights by EVERSANA in May 2019 provided insight that most stakeholders implementing population health initiatives believe that improving patient health and decreasing costs are interwoven. Though patient

satisfaction is key to population health, outcomes of population health efforts do not usually depend on such measures.

It's time to create a common foundation from which to build purposeful, customized solutions that help to harmonize the patient journey. We can then capitalize on the interconnectivity of each stakeholder—patients, providers, payers, advocacy, government—and define the roles that they must play to deliver on the Quadruple Aim's promise.

By mapping the patient journey at a local level, we can identify the inflection points where stakeholders can act to positively impact outcomes at a macro level by accepting the following as imperatives:

- 1 Embrace the 'all healthcare is local' principle supporting access to affordable, quality healthcare
- 2 Create a culture of mutual accountability between patients and payers
- 3 Use technology to engage patients in smarter ways
- 4 Recognize the impact of "specialty and direct-to-patient distribution" strategy on patient access

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ACCESS TO AFFORDABLE, LOCAL QUALITY HEALTHCARE

Patients, providers, and payers function within a local set of norms that guide their consumption of healthcare services. Brands who are successful invest in research to understand these local dynamics and understand that there is room for market differentiation by building stronger patient experiences. Today, with increased focus on health economics and outcomes research (HEOR), we can move beyond randomized clinical trials by mapping the local healthcare ecosystems to identify what works and where improvements can be made. Armed with evidence-based understanding about how we add value at a local level, we have greater ability to develop education and wraparound programs that connect and unify stakeholders with a single focus: to improve the patient therapeutic and access journey within a given therapeutic area.

CREATING A CULTURE OF MUTUAL ACCOUNTABILITY

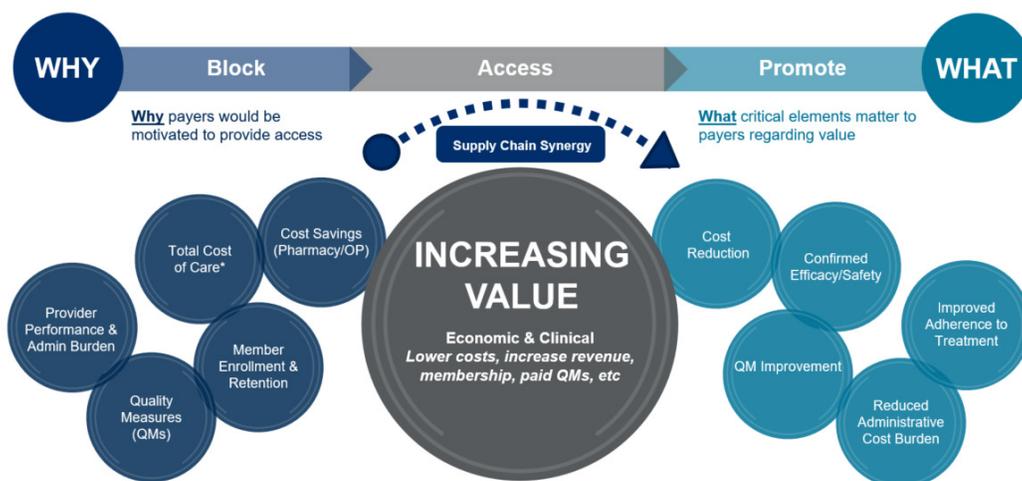
Let's be patient-centric in everything we do – focused on the “why, what, and how” behind patient behavior. Why are patients complying or not? What are the questions that go unasked to their HCPs? How does this limit their ability to maintain their health or even get better? Co-creating with patients providing real-time insight on their healthcare experiences, thoughts and concerns with their care improves our ability to provide targeted solutions to meet their unmet needs. Their perspectives can uniquely inform how we define the value of a given product and we can learn from patients who are starting to reshape their own journeys, expand their roles, and demand more value. This adaptive

approach allows us to flex up or down and develop customized, local solutions.

By understanding the role and influence of payers and organized customers, we improve our market access strategy. Given the continual rise in healthcare costs, defending the value of a brand requires us to critically evaluate the market. As the graphic below illustrates, we know the motivation for payers to cover products is complex, so we must align on the goal to increase value, both on an economic and clinical level. However, our pathway to demonstrating that value is highly dependent on the therapeutic area, market competition, clinical pathways, and economic motivators. Creating a culture where patients, providers, and payers can openly communicate is the unicorn we're chasing.

The missing piece of this equation is thinking about how we engage patients to be more accountable in their own health. Our solution centers around giving patients a seat at the table to better understand their journeys and provide targeted solutions that meet their unmet needs.

What motivates patients to adhere and comply with therapy? Building on the co-creation theme introduced earlier, the patient's perspective can uniquely inform how we define the value of a given product. Patients are starting to reshape their own journeys, expand their roles, and demand more value. Creating a culture where patients and providers can openly communicate is the unicorn we're chasing. Introducing practical initiatives and realistic expectations will go a long way toward improving the patient journey resulting in more favorable health outcomes.



*Not PDPs.
Reference: Stefanacci RG. J Clin Pathways. 2018;4(6):34-36.

USE TECHNOLOGY TO ENGAGE PATIENTS IN SMARTER WAYS

Being smart about technology means integrating solutions that enhance patient engagement and participation, as well as understanding how these innovations can advance the patient's access to therapy and experience in care. Artificial Intelligence (AI)-based platforms allow us to dig deeper into the patient experience and uncover obstacles to improved outcomes. Pharmaceutical companies are investing in new technology to help improve treatment and adherence and third-party companies are paving the way with commercial apps and digital therapeutics. However, reimbursement guidelines have been slow to change to accommodate the influx of options. As technology grows and evolves, the market must always determine the proper endpoint or outcome and be able to measure against that metric on a predictable basis. Different types of technology necessitate the need for different endpoints.

THE IMPACT OF 'SPECIALTY AND DIRECT-TO-PATIENT DISTRIBUTION' STRATEGY ON PATIENT ACCESS

If our focus is on ensuring that the right patient receives the right medication at the right time, then let's ensure that the chosen therapeutic is physically available when the prescribing decision is made. As a recent study from Health Strategies Insights by EVERSANA states, 35%-45% of pipeline drugs are infusions and injectables requiring a combination of specialty pharmacy and in-home nursing services, patient education, cold chain solutions and site-of-care administration. Many emerging biopharmaceutical companies are looking

for the flexibility of direct-to-patient distribution to support their therapy model. New strategies and solutions will become imperative to ensuring all patients, providers and manufacturers are seamlessly connected to deliver a safe and effective product in an accurate and timely manner. The need is real for supply chain strategies to address the growing complexities of today's market pressures by providing an integrated distribution service with the technologies and processes in place to distribute novel, branded and generic therapies, seamlessly.

CONCLUSION

In the end, patient centricity is about the patient's journey and the coordinated effort required across all stakeholders to ensure that the right patient receives the right medication at the right time, every time. By utilizing the insights gleaned from market research, real-world evidence, and the patient's perspective, we can develop market access strategies that provide solutions to engage stakeholders, improve access and reimbursement, optimize supply chain and distribution, and integrate specialty pharmacy and patient services. It's critical that we deliver on outcomes by aligning capabilities to achieve optimal market access and full revenue potential. Each role is built upon a deep understanding of the healthcare system and our commitment to success.

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About EVERSANA™

EVERSANA is the leading independent provider of global services to the life science industry. The company's integrated solutions are rooted in the patient experience and span all stages of the product lifecycle to deliver long-term, sustainable value for patients, prescribers, channel partners and payers. The company serves more than 500 organizations, including innovative start-ups and established pharmaceutical companies to advance life science solutions for a healthier world. To learn more about EVERSANA, visit [EVERSANA.COM](https://www.eversana.com) or connect through [LinkedIn](#) and [Twitter](#).

