DRIVING DIGITAL IN BIOPHARMA, EPISODE #4: DIGITAL'S POSITIVE ROLE IN PATIENT HEALTH

AUDIO TRANSCRIPT

Host: Tom Lehman, Global lead of Accenture's Life Sciences R&D Consulting practice
Guest: Tina Ripperger, Global Head of Health at ?WhatIf!
Guest: Jennifer Spada, Managing Director, Accenture Life Sciences Strategy & Consulting

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VO: You're listening to Driving Digital in Biopharma with your host, Tom Lehman.

TOM LEHMAN: Hello and welcome to Driving Digital in Biopharma. My name is Tom Lehman and I am your host for today's discussion and this series. We are happy to continue our podcast series on the topic of digitalization in biopharma.

In this series we are exploring the experiences and the progress that has been made with digitalization in the biopharma industry. If you've listened to the previous episodes, you'll have heard discussion around the role digital can play to connect to and engage with patients.

In this episode, we will specifically explore that topic of patients deeper with the consideration of two questions: will the disruption in healthcare we experienced in 2020 and now continuing into 2021, serve as an historic reset for patients? And, will the innovation by necessity that we've observed result in lasting changes for our industry and the patients that we serve?

01:06

Joining me for a discussion about these topics are Jenn Spada and Tina Ripperger.

Jenn is a managing director in Accenture's life sciences business and recently co-lead a research effort on patient services that included input from over 12,000 patients. The finding are very relevant for the topics we cover on this series.

And Tina is a managing director at ?WhatIf! Innovation. She is a global head of life sciences and has dedicated her career to healthcare innovation and truly addressing the problems that people face in the healthcare system. Hello Jen. And hello, Tina, and welcome to Driving Digital in Biopharma.

Before we get into today's topics, I thought that it would be good, for you Tina, to first provide an overview of ?WhatIf! and how that relates to Accenture.

TINA RIPPERGER: Hi Tom. Thanks for having me today. I am thrilled to be part of the Accenture family. ?WhatIf! was acquired by Accenture about two years ago and we are an innovation company that really focuses on innovation for growth. And we do this in two ways. We help our clients build growth futures and lead growth cultures.

When think about health futures, we help our clients set the vision for their new products, services and brands to really allow new businesses to drive growth in any future. When we think about leading growth cultures, this is really thinking through the leadership experiences and the capabilities that companies need to unlock their human potential and truly hardwire their organization for future readiness. So we're thrilled again to be part of the Accenture family and to help our clients innovate for growth.

03:34

TOM: I'm looking forward to today's discussion centered on the question of how do we create greater impact for patients. We've had a number of conversations on this series and the topic of patients and concept of patient centricity seems to show up in various different forms.

For me, it seems such an obvious focus for biopharma organizations to be more patient centric. Yet, as we'll discuss today, the research suggests there's still a lot of room for improvement. It still feels a bit elusive as companies, whether it's on the R&D side and clinical development, or for marketer products, are still trying to figure out what this means to them – and ultimately, where do they focus their capabilities and how do you maximize patient impact.

So maybe, Jenn, I'll start with you. Why do you see this discussion being so important?

03:20

JENN SPADA: We really believe that with all the change that happened in 2020 around the globe, that 2021 is the year when we can harness the momentum of that change and innovation in healthcare is really the name of the game. And our recent patient research gave us several really good insights on where that innovation can be helpful and where it's critical to improving care and improving outcomes.

03:46

TOM: So Tina, what Jenn as saying and putting in context of 2020/2021, changing the impact for patients. Why do you think innovation is more critical in 2021 than it has been certainly for a long time?

TINA: This is such a great question, Tom. In fact, we've been spending a lot of time thinking about this and really reflecting on what we're calling the historic 2020 reset and why it's so important now for our clients to not only reset, but to think about what that true growth agenda is.

04:17

As we all know, last March the world just seemed to take a collective pause. As we watched this crisis unfold everyone was forced to change our way of life; we had to adopt new ways to learn, work, connect and maintain our health – and behaviors and activities that once would have been unimaginable are now quite routine. On top of all of this, we witnessed the historic civil unrest and social activism and anti-racism action and leaders really called upon to solve for inequality.

04:45

So between both of these major shifts that we experienced in 2020, the healthcare industries been almost forced into this tectonic shift. And it's been really inspiring looking back and seeing what our life sciences and healthcare teams have accomplished. The workforce truly rose to the occasion, whether you're thinking about scientists, providers or business leaders

completely reimagining care delivery, accelerating clinical trials, and as we know, producing and distributing a vaccine in record speed. But to do all this, to drive these great solutions, industry norms had to be broken and new ways of working emerged and the health experience has been forever revolutionized.

05:22

So we've been really excited to see how people over processes came first in 2020. Expectations were reset. Our silos that were typically working within were shattered. The status quo, everything we all have been accustomed to – all the constraints that we'd worked with have become obsolete. Time to market records were broken and healthcare became health equity.

And so the summation of all of those changes, I think, is really that innovation took center stage. And now there's no looking back. We know our work is not done, we have more problems to solve and possibilities to unlock and so as a healthcare innovator, I feel like this is one of the most exciting times in my 20 year career.

06:04

TOM: And as you said, it's an interesting time to say, "Don't look back, look forward." And I think leaders and organizations have to be willing to say, "How do we learn from this and how do we benefit from this experience, as challenging as this past year was for so many companies and individuals?" But if you're sitting in that seat now, what do we need to do to realize this opportunity?

06:24

TINA: We really think, how can we harness this momentum to forever change people's health? And we really believe that the future lies in fusing what we call an adaptive strategy with organizational agility. No one can predict the future. We know that we need to be able to be responsive to the changes that our industry is facing.

But we also know that traditional strategy isn't going to work and we need to anticipate from multiple futures that we can prepare ourselves for no matter what future comes next. But it's not enough to just have that strategy. Your teams have to be agile enough and have the culture as flexible as a strategy. And so we find that the most successful companies, especially those who responded to the crisis, had the ability to unlock the agility amongst their people and the functions with the right innovation, mindsets, behaviors and new ways of working.

07:11

TOM: All right. Adaptive strategies and agile organizations combined with innovation on center stage. That's a good starting point and we're going to come back to those concepts. Jenn, I'm going to jump over to you.

How do you apply what Tina was just talking about to patients?

7:23

JENN: Well, I think we should just look back at the patient research that we did in 2020, and that that gives us some insight. Each year Accenture does patient research, generally around patient services, which we broadly defined as help across the spectrum of needs a disease creates, whether it's getting diagnosed, getting medications covered, managing side effects or monitoring ongoing symptoms.

And we did this research in 2020 across 12,000 patients globally, and we matched the questions to a similar survey that we did five years ago so we could compare the results. And what we found was really three key things. One was that patients, despite all the investment from pharma in patient services and support and despite increasing evidence that these services are really important to patients health and economic outcomes, they weren't more aware today than they were five years ago of the services available to them. And that's pretty surprising.

08:33

The proliferation of specialty products and the suite of services that accompany each one of them, we believe has created some noise that's making it harder for patients to understand what's available – and also making it hard for those physicians to help them get the right support. So that's really one of the critical insights for where innovation could help patients get the help they need.

The second one is around HCPs still being the most trusted source of information for patient services. And this probably isn't so surprising. Patients go to their physicians for a trusted source of information, a recommendation on treatments and ultimately the additional services that will help them get that treatment in the right way.

09:22

And the issue here is that HCPs are increasingly busy. They're required to do much more administrative work than they were five years ago and so their time with patients is increasingly limited. So when you combine that with the fact that there's a lot more noise out there around the patient support available, it's no surprise that HCPs need some help communicating with their patients about what services to use and how to use them.

And the third insight is really around the impact of COVID-19, which we talked about earlier, being a disruptive force around the globe and really setting the stage for innovation. And in patient services, it's really no different. Our survey found that COVID-19 forced patients to use digital channels to get care. Almost half of patients surveyed reported that they did use remote channels to engage with their healthcare providers during this time. And many of them said they liked the experience and expected to continue using these technologies in the future.

10:31

So patients are willing to use new channels to get care and we should really take advantage of this opportunity. They also said in the survey that, the COVID-19 experience empowered them to do more for themselves in terms of their healthcare.

They reported that they were more likely to go and get information on their own and really to take control of their own care. So this is another driving force of change. And I think, a great opportunity for us to harness in 2021.

11:09

TOM: Agreed, that makes a lot of sense. Now let's try to bring that together with what Tina was talking about and connect the two parts of this conversation.

TOM: Agreed, that makes a lot of sense. Now let's try to bring that together with what Tina was talking about and connect the two parts of this conversation.
As you just said, there are patients who maybe now more than ever are willing to do more for their own healthcare and might have been forced into that in 2020 with the disruption that happened. That being said, they're unaware of what's out there and probably dealing with information overload at this point. Maybe the channels are wrong. We'll see when it comes down to it. And while they would rely on healthcare providers to do it, healthcare providers themselves are challenged to try to consume all of the available information out there and do everything they can to support their patients.

And then Tina, you talked before about the fact that we are at a very unique time with all that we've experienced, all that we've learned from 2020 with innovation on a on the center stage and this innovation momentum leading into 2021. How do we take advantage of that? Let's start there.

11:56

TINA: There are moments that require an unprecedented injection of innovation, and this is one of those moments. Technology is supercharging the next wave of innovation, and our clients are aggressively seeking new end-to-end digital health solutions. People and patients are also driving a digital technology revolution because they want their health care experience to mirror the same level of digital sophistication that they experience daily, from online retail to financial services.

Thanks to their almost hourly interactions with digital forward companies, they have high expectations that everything should be personalized, seamless, quick, easy and hassle free. So overall, accelerating data and smart technology, wearables, digital health is really at the forefront of this digital revolution.

And it's really critical for us to not only think through how we can help our clients manage this unimaginable amount of data, but also how to accelerate the innovations to reinvent the patient experience. Connected care, remote care, human experiences when they're thinking through—especially in this new world of interacting with their physicians and new and different ways—is now more important than ever.

13:14

TOM: And make the connection, Jenn, to some of the findings in the patient research Accenture did. Is technology making the problem worse or is technology seen as an enabler to make it better?

13:24

JENN: So I think Tina mentioned earlier a good point that kind of helps us answer this question, and it's really around understanding the moments that matter. So technology can be a huge help when it's applied to the right unmet need. And I think, the secret to getting this innovation right and making sure it's valuable to patients and really changes the health and

economics of their treatment and their care, is that we really fully understand the human experience and where the unmet needs are and we solve for those.

And in pharmaceuticals, where the medicine and the technology have to be so tightly coupled, whether it's a diagnostic service or monitoring of biometrics during care, those things have to be thought about in clinical development as well as in commercial.

14:22

So it really is important to make sure that that understanding of the patient happens across the enterprise and that we're solving for those moments that matter within clinical development and within commercial. That coordination is starting to happen. But, we're going to get the most out of the innovation when we really bring those two pieces together a bit more.

14:51

TOM: And I would suspect that those moments that matter, of course, will vary depending on the therapeutic area, may vary depending upon, of course, whether somebody is enrolled in a clinical trial versus taking a marketed product. But I also have to imagine that those moments may also vary depending on the nature of the population.

Tina, you mentioned a point before that in 2020, healthcare became health equity, which is an interesting way to look at it. If I connect to the point here around technology and digital. What are you seeing as far as just health equity and the digital divide, particularly with these moments of matter?

15:19

TINA: This is such an important topic, and as we mentioned, this pandemic just exposed persistent health disparities that leave many people at greater risk for poor health outcomes. And so not only is it a moral issue to kind of drive

health equity, but it's also a business issue. And we're in the business of care and as leaders, it's really time for us to think about the inequity that's embedded throughout the system.

So when you think about research and development, what we're talking about, either the data sets or the algorithms, we have to interrogate that and understand if there's any racial bias built into that.

When we are recruiting for a clinical trial, is the trial diverse? We're seeing how important that has been through the clinical trials for the vaccine, that you have to have a diverse population. But it all goes through then to commercial, where we're thinking about market research, patient services, communications, market access. We have to really interrogate the health equity and make sure that what we're building is equitable for all.

16:16

And you mentioned an important point around the digital divide. So many of us, while maybe our routine visits to take care of ourselves during the pandemic were suspended, we were able to supplement that through virtual visits, whether we dialed in or had teleconferences on our cell phones or our computers, there are many people that may not have access to high speed Internet or connectivity through a computer. And so are we expanding and exacerbating the digital divide that exists through a lot of the technology interventions that we so successfully deployed during 2020?

So I think there's two routes that we need to take. One is really understanding that digital divide and figuring out how we can bridge that for emerging populations that are really at risk for this, as well as thinking of the systemic bias that may be built into some of the healthcare that we are delivering today.

17:08

TOM: And Jenn, either in the research or your

experience, is this concept showing up as it relates to the design of patient services programs or patient services impacts?

17:17

JENN: It is and I think it really leads us to a place where health equity doesn't mean the same answer for everyone, right? It means that we need to really understand the different populations and patients that we serve and create an answer that works for them and is tailored to them. So I can give a couple of examples.

When we did our research last year, we looked specifically at the results for cancer patients and cancer patients, you would expect, would be motivated to get additional support and care during their treatment journey. And in reality, cancer patients ended up being less aware and adopting support and services less than the broader patient population that we surveyed.

And when you clicked on age as an additional factor within that population, we found that older patients were less likely than patients in other therapeutic areas, as well as younger patients, to engage with technology. However, they used apps on their phone more often than any other age group.

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So we have a unique insight about a particular patient population that needs support. And harnessing those unique insights is going to be critical to getting the right answer to serve that population. And I think that really needs to be one of our new ways of working.

Another example, and this really shows that necessity is the mother of invention, and that the healthcare market is already starting to innovate ahead of some of the things that we're doing in pharma… But there's populations out west that live on Native American reservations and during the COVID-19 pandemic, there was a lot of strict access in and out of the reservation.

So in order to access specialist care, the reservation started setting up mobile clinics. They had nurses that could do testing, that could compile test results, that could schedule appointments for patients, that could give them some of the emotional support that they needed. And then they were provided an iPad. Their files were sent to the right specialists, at a remote academic center, and they were given the iPad to consult with physicians in their car. Again, a unique sort of insight and dynamic about an underserved population in health care. And, there's a way to address and bring more equity to their care.

20:17

Tom: So a question for both of you: is 2020 and now into 2021, an inflection point for patient experience?

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TINA: I believe it is. I think everything, as we've talked about, has been this great reset. And so whenever we had been focused on adherence, it was always important to understand if a patient is experiencing an inflection point, whether they were on an oral medication and they're going to an injectable, or if they have been recently hospitalized. We know that their behaviors are being reset. There's a small window where you have an opportunity to influence and to create a new first impression.

And so from a patient experience point of view, because everything we've known has been disrupted, we have a very unique opportunity to reframe, to reintroduce what healthcare means, how they can engage and interact, and to really reimagine how they receive and proactively manage their care. So this truly is a unique opportunity for us to improve the patient experience and to reset their expectations.

21:12

JENN: And I do think in practice, we've talked about understanding the patient journey and

aligning patient services to that journey for years now. But this COVID-19 pandemic has really proven the impact of doing that in a different way. And so that is motivating behavior change.

And I think to Tina's point, we can capitalize on this momentum and make even bigger impacts and success begets success. So I think the more that we harness this movement, the more success we're going to have, and the more accelerated our journey is going to be to more impactful patient engagement and more equitable care and to better outcomes overall.

22:04

TINA: Jenn, you bring up such a good point about the patient journey too. One of the most exciting things we're seeing in the patient experience is, when you think about digital health solutions, they're really extending or expanding the traditional care boundaries of that journey and creating a whole new platform for proactive wellness. So healthcare, typically, when we think about the patient journey, it may start with that first symptom. We help to diagnose, deliver, treat, cure and care.

But what we're seeing with digital health and what that's allowing, is that we're able to shift that north of the prescription, well north of the prescription, and really think about predictive diagnostics, upstream determinants of health, real-time interventions before it gets too severe. And so there's a real predict and prevent opportunity for us to really use digital health to extend that journey and really think about a person's or a holistic well-being and not just the patient journey.

23:00

JENN: And that's a great point. In order to make that work – and for everyone to benefit from not just patients, but pharma, the healthcare system, the government, other payers – everyone needs to work together. And I think one of the things that's going to really unlock this opportunity and have more of a holistic human approach to

healthcare, is going to be the ability to collaborate across the ecosystem pretty seamlessly.

And healthcare systems and payers and pharma are going to all have to work together and that requires technology. In addition to the digital devices or monitoring technology that we've talked about in terms of the therapeutic, there's technology required to integrate data and visualize data and safely share data across all those ecosystem partners. And so that's also going to be a really important aspect of this journey that we're going on in 2021.

24:01

TOM: What you're describing, Jenn, is a lot of convergence and in this industry it will need to come from a number of directions. Tina, you also talked about technology and perhaps the changing perspective of us as individuals or patients wanting to be much more health and wellness oriented. At some point, somebody is going to take the lead here to move this forward.

Where will this leadership come from? Is it sitting within the pharma companies? Is it more on the healthcare provider side? Is it some combination of the two? What does that look like? Again, coming back to the first part of this conversation where we have faced this moment in time where we've all gone through this experience and it's best to look forward and not look backward where possible. But where will this leadership come from?

24:40

TINA: I think that is the question of 2021. This is definitely the era of convergence in health and our own CEO, Julie Sweet, said, every business is now a health business. Everyone is really racing to fill the patient experience gaps that a lot of us have been experiencing. And we've seen this wave in the last several years around new health digitals coming in or [category of logics?] to really try to win the customer over and create a more human experience. But now we're

also seeing the large MAGs, financial services companies, telecom, retail, coming in to the healthcare space and questioning the norms, bringing a fresh set of human centered solutions. But often they might lack that deep expertise and experience and regulatory understanding to really survive long term.

So I think the winner is the combination of the two. Instead of thinking of a lot of these different new entrants as disruptors… where can we really coalesce to find ways to drive or solve some of the systemic problems that we're facing – some of these bigger human problems that we're facing – and come together and truly integrate our data, really make sure that we're working together seamlessly to try to solve some of these problems?

So I'm hopeful that it's the true definition of the word convergence that will ultimately be the winner. But obviously, life sciences and health are the core of that, given the deep expertise and understanding of the patients and the people that we serve.

26:08

TOM: Absolutely. So, Jenn, if you were to project forward and consider today's discussion. When you refresh your patient research in 2025. Where are we at that point five years from now? Does 2021 show up as a catalyst for change?

26:22

JENN: Yeah, that's a great question, I certainly don't have a crystal ball, but my hope is that leaders in each of the companies that we just talked about, the pharma companies, the payers, the MAGs, the telecoms, that they allow their organizations to be inspired by this challenge and to really work across the organization and the ecosystem to solve these big problems for patients.

And then that leads us to a world where digital and medicine is one, and patients have generally adopted the use of digital services and

support in their healthcare as a norm, and that the health and economics of treating patients has radically improved. And we're really looking at curing disease rather than treating disease.

27:25

Tom: I really like that vision for the future. Tina, you mentioned earlier the concept of agile organizations, which certainly, if we learned anything from 2020, the need to be agile is certainly a core capability for us all. So expand on that a little bit for me. As you project into this coming year, with all of the conversation we've had around technology, and health equity, and leadership, and just the things that need to happen to become more patient centric and change a patient experience.

Put yourself in a leadership seat at a biopharma organization, what does an agile organization look like in 2021?

37:57

TINA: That's such a great question. With all of these things, with this adaptive strategy that we have to respond to all these exciting innovations, it really doesn't mean anything without the people and the culture to drive it forward. So we believe the winners in this new world will really embrace this organizational agility, which really means it allows their people to innovate at speed and scale.

They have a learner's mindset, where they're constantly trying to be in touch with the people that they're serving. They're experimenting with new ways to deliver services. They're adapting based on what they learn from those experiments. And they're constantly iterating on that.

And we believe that we want to inspire our teams to really perform with the same agility and audacity that they demonstrated during this crisis in the everyday. And that's really, I think, the power of bringing this organizational agility mindset forward. Because, if you think about it,

we really renewed our belief in innovation over the last year. And so we want to harness that momentum, but really embedded at scale, whether it's really embedding those mindsets and behaviors in our culture from the leadership all the way through, so that they can really continue this momentum going forward in 2021.

29:10

TOM: If 2020 resulted in innovation by necessity, then the question is how can organizations easily pivot to say, "This isn't about reacting to something, it's about making it a standard or making it our norm." Are you seeing companies already starting to make that pivot?

29:26

Tina: They're already starting to make that pivot. We're getting asked this question every day. They want to make sure that they're continuing to support. They don't want to burn other teams out. They realize the hours and the effort that were put in to really solving some of the problems during the crisis. But they want to take the magic that came out of that and really make sure that they continue to embed that every day.

So, how can they continue to really make sure that their teams understand… are motivated by the purpose, not only of solving the crisis, but ongoing the purpose that our clients are working for every day, seeing the possibility in that, maintaining the adaptability that they showed and also the audacity to really think and question some of the norms and really find very strong ways to still work within the constraints of the system, but also to deliver new solutions.

So it is it is the number one question that that we're also thinking about in terms of how to continue that collaboration that they also showed within teams, Breaking down those boundaries, really emphasizing resource fluidity, even within the companies themselves and with external partners. So harnessing that it will be critical going forward.

30:37

Tom: Excellent. So why don't we close on that topic. And I'll try to pull a couple of pieces together from our discussion. So as we look at the experience of 2020 and into 2021, it has set us at a very different starting point for this year and beyond, frankly when it comes down to it.

As you said, the ability to continue to collaborate in new ways and to make those the norm will be key. We have the need to have the agility to be able to pivot and react to changes and also to scanning for disruptions and that will become essential in any organization.

As I make the jump into the patient side of our discussion and consider the conversation we've had around where are we right now as far as the ability to understand and to support patient needs beyond the medication and treatments. We have to ask, is there still a significant gap? How do you bring these ideas from today's discussion together, ultimately, I think, is the challenge for our industry.

So I really appreciate the conversation today. It was a great way to bring together two very different concepts into one common objective here: to be much more patient centric, and much more focused on the patient experience and the patient at the center here. So thank you, Jenn. Thank you, Tina, for joining. Appreciate the discussion and look forward to hearing more about the journey of patients in 2021 and beyond.

TINA: Thank you so much.

JENN: Thank you. It was a pleasure.

31:55

TOM: I really enjoyed today's discussion with Jenn and Tina, and we'll definitely keep the impact on patients and patient centricity as topics in future episodes. They brought up a couple of questions that I think we all need to reflect on as we look, at not only the impact that digital can have across the value chain, but also the broader context of industry at this point in time.

First of all, how has your organization or your team become more agile as a result of the great 2020 reset? How do we all keep innovation on center stage and keep the momentum going in 2021. And finally, how can we take what we've learned in 2020 to make the patient experience and health and wellness journey that much better.

We have some great episodes coming up that highlight some of the great stories of digital in our industry and I look forward to sharing those with you.

Thank you for listening. Please remember to like and subscribe to Driving Digital in Biopharma on your favorite podcast platform so you don't miss an episode.

Until next time, this Tom Lehman with Driving Digital in Biopharma.