

Accenture Life Sciences
Patient Inspired. Outcomes Driven.

THE NEW PATIENT EXPERIENCE

REVOLUTIONIZING PATIENT
SERVICES THROUGH DIGITAL
TECHNOLOGIES



INTRODUCTION

Value-based healthcare models are creating new technology needs in the market. Life sciences companies must take steps to establish an enterprise-grade connected platform to support the full patient journey. If they don't, they'll be unable to compete in the race to demonstrate patient value.

Life sciences companies today face a host of demands. As the number of specialty drugs on the market continues to grow exponentially (projected to account for 53 percent of overall pharmaceutical market growth between 2015 and 2020¹), companies are challenged with increasing access, enhancing affordability and improving adherence services – all while demonstrating measurable outcomes for payers and providers alike. This is a key part of the broader shift to value-based models of healthcare, where the focus pivots from volume (of products sold) to value (of patient outcomes).

As a result, life sciences companies' priorities are evolving. They are looking for new solutions that can alleviate the financial burden on patients and healthcare providers, while providing a high level of patient support. They also recognize the fundamental importance of an end-to-end view – or a single source of truth – of their patient journeys to provide a data-driven foundation for both optimizing patient experiences and demonstrating differentiated outcomes.

Why is this single source of truth for patient journeys so important? Because in order to truly deliver a better patient and economic outcome, companies must be able to:

- 1 Measure the effectiveness of their services or run the risk of continuing to invest in ineffective solutions;
- 2 Orchestrate a cohesive patient experience leading to unmet patient needs, patient drop-offs and switches; and
- 3 Correlate the services they provide with actual improved patient outcomes.

These imperatives are creating a new set of technology needs in the market. And Hub providers, data service providers, distributors, marketing services providers, global systems integrators and other third parties are all stepping in to help. Yet, while there are positive signs of progress, these approaches are limited in addressing the full scope of the industry's needs. Since each service provider brings its own technology solution to bear on its own piece of the process, life sciences companies are faced with a complex, disconnected landscape of solutions to manage. And, more importantly, business owners struggle to understand how well their patient support programs are operating.

This fragmented approach has left companies with the same fundamental questions: How can we get a consistent view of our program effectiveness across the whole patient journey? And, when we get that consistent view, how can we use it to take this multitude of different solutions and services and make them feel like a single, unified solution for the patient? Performing this kind of "patient experience management" is the key to unlocking value from each individual solution.

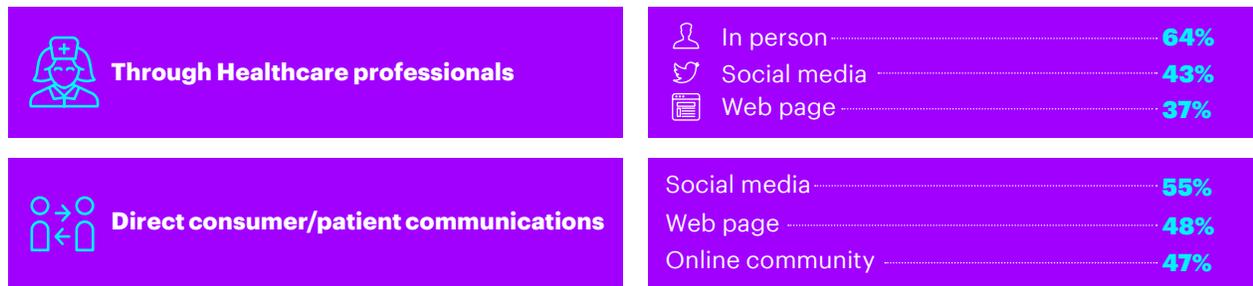


GREATER INVESTMENT – GREATER DISCONNECTION?

Investment in patient experience is growing but includes overlapping and disconnected services.

How has this problem arisen? As life sciences companies have come to see the value of digital engagement, they've increased their investments accordingly. Our 2016 survey of over 200 patient services executives² shows that more than 90 percent of US companies are planning to increase their investments in patient engagement technologies and supporting analytics over the next 18 months. And digital channels are becoming a key means of interacting with patients. In fact, when we asked the same group of executives about how they make their patients aware of their services, the following digital channels played a dominate role:

Please rank the top three ways in which you make your patients aware of your services. (Percentage of respondents citing channel in top three)



But this greater investment has brought with it an ever-increasing need to connect and coordinate numerous, disparate solutions to ensure well-orchestrated patient experiences. Without this coordination, the value of these services is diluted – for life sciences companies and patients alike. This is evident in the support that companies provide, to both patients and physicians, in using a drug and maintaining a therapy regimen. Their objectives are straightforward: increase patient access to medications, ensure compliance and improve brand performance and patient outcomes. But few life sciences companies are approaching these kinds of services in a consistent and connected way. Rather, decisions about individual brands are often taken with short-term interests in mind. The result: a proliferation of vendors, platforms and services that don't always provide a consistent and connected experience for the patient or the physician.

For life sciences companies, this approach is not sustainable and will not achieve the goal of delivering a better patient outcome. In fact, in the same survey of patient services executives, over 60% of respondents indicated they cannot precisely measure the impact of patient services on outcomes. They might aspire to a future where the patient experience is consistent regardless of channel, service or vendor, but they have yet to make it happen. The challenges raised by today's pace of change and scale of needs across brands can't be solved by addressing one solution at a time. Furthermore, because existing and future solutions span clinical, medical and commercial engagements with patients, a cross-enterprise approach is needed.



ORCHESTRATING THE PATIENT EXPERIENCE

The future for life sciences companies lies in orchestrating all the elements that make up the patient experience.

How should life sciences companies move forward? There are a number of ways to address the challenges associated with the proliferation of patient services and solutions. One is to go it alone, and try to do everything internally. A second is to embrace the open innovation of the digital health ecosystem – and become the master orchestrator of harmonized patient experiences.

GOING IT ALONE. Here, a manufacturer uses its internal IT organization to create patient engagement capabilities, such as mobile applications, portals and websites, as well as supporting data and analytics solutions. This approach forces life sciences companies to focus their time and investments in building individual capabilities, as well as keeping pace with brand team requests and the fast-evolving demands of healthcare consumers. This likely leaves less time to analyze the effectiveness of the solutions created to enhance the patient experience. Furthermore, these organizations face the continuous challenge of matching the maturity of other specialty service businesses in the market.

EMBRACE THE ECOSYSTEM. Here, the manufacturer first looks to the market for solutions to solve the commoditized brand and patient needs. When a solution isn't available, or is dependent on a capability that is highly strategic to the manufacturer, then it will invest in developing internally. As opposed to investing in building new solutions, they focus investments in connecting all the disparate market solutions to fully coordinate and orchestrate the patient experience. It then measures the use and effectiveness of those solutions. This approach lets the manufacturer take advantage of the most progressive solutions available in the market to collectively and comprehensively deliver the best patient experience.

Our experience shows that the second approach – *embracing the ecosystem* – is the most effective to delivering the best, most holistic patient experience over the long haul. First and foremost, it alleviates a common pain point – a lack of connected information. But it also helps harness the investments being made by the various players in the wider ecosystem, and brings together the best-of-breed capabilities they all have to offer.

This orchestration approach provides a 'control tower' which gives life sciences companies a clear view of what each service, vendor or capability involved in the patient experience is doing. It lets them measure the effectiveness and use of each of those elements to make adjustments based on the insights obtained. This approach then allows them to direct their investment to the capabilities that are providing the highest returns, as well as delegate the execution of those capabilities to the partners or organizations best suited to deliver them.

Orchestration also provides a foundation for accurately measuring outcomes – an essential part of value-based healthcare models. Once data is collected in a standardized way across all a brand's services, the manufacturer is positioned to demonstrate the effectiveness of its product in a commercial setting – and to tie commercial patient services to clinical outcomes.

The key to achieving this end state? Leveraging a technology solution that lets all service providers plug into a common framework and backbone. Modern SaaS and PaaS technologies can also play an essential role – not only will these allow life sciences companies to easily scale capacity up and down in accordance with demand, but, by leveraging industry-standard solutions, they can also reduce the cost of entry and time to market.



PUTTING THE RIGHT TECHNOLOGY IN PLACE

What technologies should be leveraged to enable patient experience management?

There are new digital health solutions emerging to address this need. A successful ‘master orchestrator’ of patient experiences relies on a set of three key technologies:

1. AGILE PLATFORMS. Cloud-based as-a-service technology platforms which are agile enough to allow solutions to be quickly scaled up and down according to changing business needs. To exploit them to the full, life sciences companies need to:

- 1 Establish a cloud strategy.** If they haven’t done so already, companies should determine which clouds their future state architecture will leverage – and create a plan to move their solutions accordingly. If possible, they should coordinate their cloud selections with those of their strategic partners. That way, they’ll allow for greater interoperability from the outset.
- 2 Modernize and consolidate existing solutions.** They should look to quickly migrate their existing technology assets to the new cloud platforms. This will reduce the total cost of ownership of operating the current state – and free up resources to innovate.
- 3 Scale the solution across brands, therapeutic areas and geographies.** To realize economies of scale and optimize the investment, companies should stand up the infrastructure by scaling it across additional brands, therapeutic areas and geographies.

AGILE PLATFORMS IN ACTION:

Accenture has partnered with one client to enable an agile, cloud-based technology platform, based on Accenture’s Intelligent Patient Platform. This has allowed the client to scale its solution across ten new brands in a matter of weeks. In another successful deployment of the Accenture Intelligent Patient Platform, a client was able to not only scale its solution across all of its specialty brands, but also deploy globally to over 20 countries, enabling each new country’s program in less than eight weeks. Both clients were able to reap the benefits of an initial up-front investment in the platform that allowed them to add new users, brands and geographies quickly and for a relatively low cost.

SEAMLESS ECOSYSTEMS IN ACTION:

Accenture and Roche have collaborated to build a new analytics-driven ecosystem and services that will improve how diabetes care is managed and delivered. Built on the Accenture Intelligent Patient Platform, the new capabilities will enable Roche to gather and analyze data, generate new patient insights and work with multiple partners, services and devices used to manage diabetes care. By connecting patients, caregivers and healthcare providers, the aim is to make better-informed care decisions that can drive more precisely personalized support to each patient.

2. SEAMLESS ECOSYSTEMS. Service providers and healthcare technology companies are making big investments in new and innovative healthcare technologies. The key is to seamlessly incorporate these ecosystem solutions as quickly and easily as possible – this is the essence of effective patient experience management. Life sciences companies should:

- 1 Establish a service exchange.** They should create a data connectivity framework that allows data to be communicated to and from partner solutions through a modern, modularized API layer. This is the foundation of any seamless partnership.
- 2 Open existing partner connectivity.** Companies should “turn on” interconnectivity with existing partners. That way, they can start orchestrating the patient experience across existing channels, where there may be current gaps.
- 3 Expand the use of partner solutions.** With the framework in place and existing partners onboarded onto the service exchange, companies can begin to incorporate additional leading solutions to enhance the service. In doing so, they must ensure data is collected and aggregated in a standardized way – so that the patient experience is managed effectively across all these solutions.

3. APPLIED INTELLIGENCE. Intelligent analytics platforms can not only provide insights but also use predictive algorithms and artificial intelligence to make better business decisions and protectively improve each individual patient interaction and recommend paths to optimize patient support. To get the best from AI, life sciences companies should:

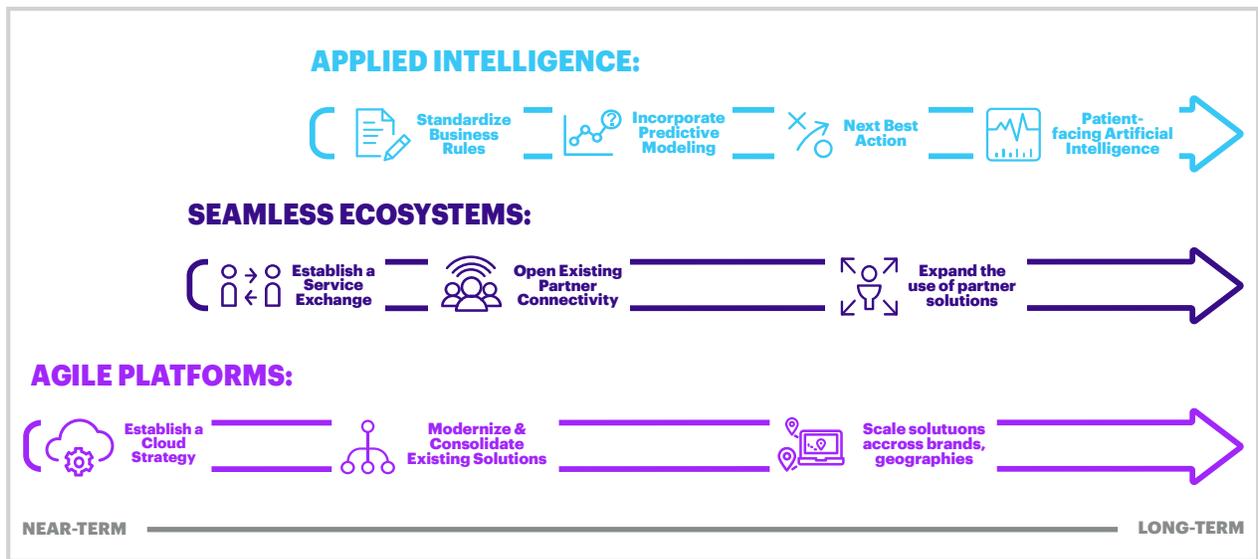
- 1 **Standardize analytics platforms.** By standardizing their analytics solutions on a common platform, companies can lay a solid foundation, not just for descriptive analytics (what happened?), but also for predictive analytics and intelligent insights (what will happen?).
- 2 **Incorporate predictive modeling.** Companies should start small by incorporating predictive models into common business questions. Then, prioritize the scaling of the predictive modeling in the areas with the greatest value for both the manufacturer and the patient. For example, they should consider prioritizing predictive modeling of the risk of patient drop-offs rather than, say, alternative coverage qualifications.
- 3 **Determine the best action.** Applied intelligence should be used to recommend the optimal action to take at each stage of interactions with specific patients. This data should be shared with care team members – and even with partners that may be interacting with patients on a manufacturer’s behalf.
- 4 **Develop patient-facing artificial intelligence.** AI and virtual agents should be leveraged to support patient self-service. Voice recognition should also be enabled to enhance the experience.

APPLIED INTELLIGENCE IN ACTION:

A company using one of Accenture’s analytics applications is now able to explore the impact of different patient engagement tactics on medication adherence. The application uses AI to predict how adherence will be affected in each patient segment, for example, if the use of digital channels (email/SMS) were upped from 40 percent to 60 percent. This brings newfound insights into effective patient engagement. But this is just the start. Life sciences companies have a tremendous opportunity to start incorporating prediction and artificial intelligence ever deeper into patient experience management.

The pace and scale at which each of these strategic technologies are deployed will vary from company to company. But we would typically propose a roadmap that looks like this:

PATIENT EXPERIENCE ROADMAP



Adopting these digital solutions will allow life sciences companies to optimize their investments in the patient support services that provide the highest impact on outcomes. It will also better focus the investment need and reduce time to market, by removing the requirement to recreate common, commoditized services that are widely available from third parties. Perhaps most importantly, it will enable companies to be more responsive to patient needs by understanding and tailoring interactions across the full patient journey.

WHERE DOES THE HUB FIT IN?

Putting the pieces together across internal and external resources.

In becoming an orchestrator of patient experiences, a manufacturer must also consider its approach to insourcing and outsourcing. Most will have adopted one of three models:

FULLY OUTSOURCED, where the manufacturer relies solely on a Hub to provide services to patients. The manufacturer's primary view into these services is an aggregated and anonymized set of analytics and reports.

FULLY INSOURCED, where the manufacturer has made a strategic decision to insource the provision of services to patients. Thus, the people that engage with patients are employees of the manufacturer. The manufacturer also usually owns the technology solutions required to operate the services.

HYBRID MODEL, where portions of the services are outsourced, but others are retained by the manufacturer. The precise division of responsibility varies with each business, but hybrid models generally call for an integrated technology ecosystem of both internal and Hub-owned solutions.

Each of these three models is likely to persist for the foreseeable future. And in choosing between them, a manufacturer must consider factors specific to its own business, such as its organizational strategy, brand needs, and competitive differentiation.

The important point is that, regardless of the outsourcing model adopted (and the technology ownership model that results), the key elements of our strategic recommendation hold true – for both a manufacturer and the partners it chooses to work with. So, partnering with organizations that share the same approaches to the enabling technology – agile platforms, applied intelligence and seamless partnerships – is the best way to guarantee optimal business results and the highest returns on the technology investment.

The value-based healthcare models of the future call for coherent end-to-end patient experiences. And that means harnessing the very best of the healthcare IT ecosystem, while orchestrating all the disparate elements to enable cohesive and measurable patient journeys. This is the approach that will provide the highest returns for life sciences companies, and lay the foundation for outcome-based business models. It's time to start orchestrating – and get the industry working in harmony for patients.

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ABOUT ACCENTURE LIFE SCIENCES

Accenture's Life Sciences group is committed to helping our clients make a meaningful impact on patients' lives by combining new science with leading-edge technology to revolutionize how medical treatments are discovered, developed and delivered to people around the world. We provide end-to-end business services plus a broad range of insight-driven services and solutions in strategy, consulting, digital/analytics, technology and operations in all strategic and functional areas—with a strong focus on R&D, sales and marketing, patient services and supply chain.

We have decades of experience working with the world's most successful companies to innovate and improve their performance, operating across the entire life sciences value chain to better serve patients and stakeholders. In more than 50 countries, Accenture's Life Sciences group connects more than 15,000 skilled professionals who are personally committed to helping our clients achieve their business objectives and deliver better health and economic outcomes.

ABOUT ACCENTURE

Accenture is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology and operations. Combining unmatched experience and specialized skills across more than 40 industries and all business functions—underpinned by the world's largest delivery network— Accenture works at the intersection of business and technology to help clients improve their performance and create sustainable value for their stakeholders. With more than 411,000 people serving clients in more than 120 countries, Accenture drives innovation to improve the way the world works and lives. Visit us at www.accenture.com.

¹ Accenture industry research based on Evaluate Pharma, September 2016

² The Patient Is IN. Pharma's Growing Opportunity in Patient Services, Accenture Research 2016