Health counselors and 103 from Europe executives based in the US

Pharma's Growing Opportunity in Patient Services
The Patient Is IN
Rethink  Reshape  Restructure...for better patient outcomes

Top three ways to make patients aware of services:

1. Valued by 85%
   - Medication Delivery/Support

2. Expected increase by 55%
   - Digital channels play a dominant role in making patients aware of their services.

3. Covers seven therapeutic areas:
   - Companies are going big with investments in digital engagement technologies and capability.

KEY FINDINGS

IMPLICATIONS

Patient services are delivering value with a significant number and increased investment from pharmaceutical companies.

Although only 1/2 of the respondents rate their companies offering six or more services, the majority of respondents agree that pharmaceutical companies need to prioritize patient services as integral to achieving better outcomes, they will be much more inclined to discuss the solution with the patient.

Focus conversations on the outcomes achieved by the solutions (products + services) you offer. When healthcare professionals see the bundled solution as strong today.

Develop a robust measurement capability to ensure your patient services strategy.

Invest in understanding the needs of patients to direct your patient services investments and access support for successful outcomes.

Investment should be led by what patients value, but also aligned to what is expected to grow the most.

It will no longer be a question of if pharmaceutical companies should offer services, but which ones and how.

Patient services will become a competitive driver and are no longer optional for pharmaceutical companies.

About the Research

Responses from more than 200 patient services executives in the US and Europe.

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Potential market to secure

The majority of companies are not yet able to precisely measure the impact of patient services on outcomes as their #1 objective.

Companies cite improved patient outcomes as their #1 objective to precisely measure it.

The average number of services offered by companies is 6.4.

Average business impact.

95% of companies are planning to invest in patient engagement technologies over the next 18 months.

85% of companies are raising their investment in patient-centric capabilities on current and anticipated activities and investments in patient services across seven therapeutic areas.

Raising investment in patient-centric capabilities.

Most of patient reimbursement generate are rapidly changing but without full measurement of the patient experience.

POTENTIAL BARRIERS TO SUCCESS

As strong today.

Heads of patient services/experience are rapidly emerging in people and patient experience.

Some cases where patient value exceeds expected outcome.

9 of the top 10 services available from pharmaceutical companies.

However, just 19% of respondents rated as strong today.

Although patient engagement technologies are rapidly changing without full measurement of the patient experience.

THIS IS JUST THE BEGINNING...