### ABOUT THE RESEARCH

Responses from 100 patient services executives in the US on current and anticipated activities and investments in patient services across seven therapeutic areas.

### KEY FINDINGS

- **Today 2 Years**
  - 69% of US companies are raising their investment in patient-centric capabilities
  - 92% of US companies are going big with investments in digital engagement technologies over the next 18 months.

- **US companies offering six or more services.**
  - 51% of the respondents rate their average business impact.

- **Patient services are delivering value with a significant expansion in service offering:**
  - There are some cases where patient value exceeds expected increases in focus and investment expected over the next two years.

- **Most of the US respondents primarily look at patient outcomes as their #1 objective to precisely measure it.**

### IMPLICATIONS

- **Focus conversations on the outcomes achieved by the solutions (products + services).**
  - Articulating the patient and economic value of services as integral to achieving better outcomes, they will be much more inclined to offer services, but which ones and how.

- **Develop a robust measurement capability to ensure your patient services services strategy.**
  - It will no longer be a question of if pharmaceutical companies should offer services, but which ones and how.

- **Invest in understanding the needs of patients to direct your patient services strategy.**
  - Investment should be led by what patients value, but without full ownership of the patient experience.

- **Mixed or unclear ownership may create inefficiency and limit the impact of patient services on outcomes.**
  - Heads of patient services/experience are rapidly emerging in the majority of US companies.

- **The majority of US companies are not able to precisely measure the impact of patient services on outcomes.**
  - Measuring business value is critical to sustainability.

### PATIENTS SAVORS TO SUCCESS

- **Stay Connected**
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### KEY SEGMENTS

<table>
<thead>
<tr>
<th>Segments</th>
<th>% of respondents assessing their capabilities as strong</th>
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<tbody>
<tr>
<td>Transportation</td>
<td>74%</td>
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<td>TV regulatory permitting*</td>
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### About

Accenture Life Sciences

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*Value from life sciences services available from pharmaceutical companies.

However, just 19% of respondents rate their average business impact.

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