

Patient-centric Strategy

15 Years
in Search of
Innovative
Solutions

**What patient services
pharma companies
should propose?**

Position Paper (V2)

November 2016



**Smart Pharma
Consulting**

1, rue Houdart de Lamotte – 75015 Paris – France
Tel.: +33 6 11 96 33 78 – Fax: +33 1 45 57 46 59

E-mail: jmpeny@smart-pharma.com – Website: www.smart-pharma.com

This position paper proposes guidelines to define a patient-centric strategy and the corresponding initiatives to create value for all stakeholders

Key issues addressed

1. What does patient centricity mean?

2. Why is patient centricity essential?

3. How to craft a patient-centric strategy?

4. How to implement patient-centric initiatives?

“Put patients first and profits will follow¹”

– George W. Merck –

¹ Adapted from the following quote of George W. Merck, former President & Chairman of Merck & Co: “We try never to forget that medicine is for the people. It is not for the profits. The profits follow, and if we have remembered that, they have never failed to appear. The better we have remembered it, the larger they have been”

More and more pharma companies have been communicating over the past years that patients are at the heart of their strategy

Patient centricity: Is it the new buzzword? (1/3)



*“Our business is focused on **making** the most meaningful **difference to patient health** through great medicines”*

Illustrative¹

*“We are dedicated to improving the quality of human life by **enabling people** to do more, **feel better** and **live longer**”*



“Driven by our commitment to patients, we bring innovative products, services and solutions to people throughout the world”

*“We make products and services with the purpose of making a difference and having an **impact in people’s everyday lives**”*



*“Our mission is to discover new ways to **improve and extend people’s lives**”*

*“UCB is inspired by patients and driven by science. Patients are at the **heart of everything we do**”*



*“**Everything we do** - from producing pharmaceuticals to offering numerous other relevant services - **is patient-driven**”*

If patient-centricity is a stated priority, it has taken on different meanings and led to different types of projects of variable scope, depending on the pharma companies

Patient centricity: Is it the new buzzword? (2/3)

- The concept of patient centricity is widely used in the pharma sector and can be defined as:

“Offering solutions (products and/or services) – directly or indirectly – to patients from which they can benefit in terms of medical results and/or quality of life”

- In practice, patient-centric strategies have been materialized in business initiatives that are very different in nature and importance, ranging:
 - From **publishing** disease-related **documents**
 - To **involving patients** in **key decisions** all along the life cycle of a drug
 - Via **bringing a support along the patient journey** with specific services

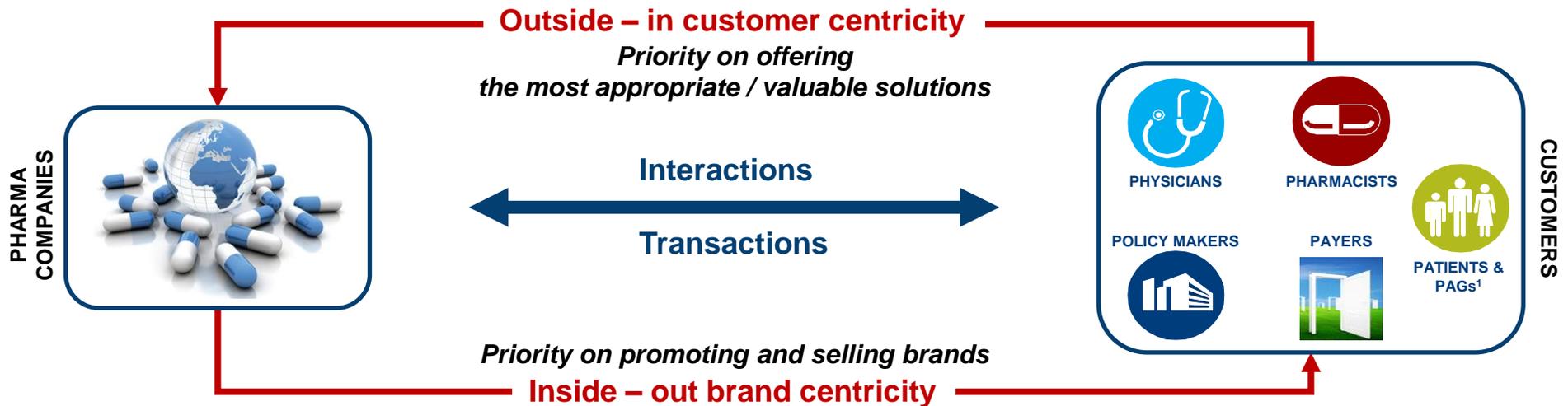


- Patient-centricity should not be just another buzzword because it is relevant for pharma companies:
 - To **craft** their **business strategy**, based on the **needs and wants** of the **end customers** (i.e. the patients)
 - To **make sure** that patients will **get** the **best medical outcomes** and **quality of life**, considering their disease and the treatment they have been prescribed by physicians and this, along the patient journey

Patient centricity is one component of the customer centricity strategy which consists in going that extra mile to provide entire satisfaction to customers

Patient centricity: Is it the new buzzword? (3/3)

- Patient centricity is **part** of the **customer centricity concept** which has become one of the strategic pharma companies priorities for a decade or so
- Customer centricity is about **building positive experiences** with customers **through** the **quality of interactions** and/or the **benefits provided** by products or related services offered by the companies
- Amongst the different customers, **patients occupy a particular position** in the sense that they are the end customers and, as such, **the customers of all the other stakeholders** of the pharma market



Source: Smart Pharma Consulting

¹ Patients advocacy groups

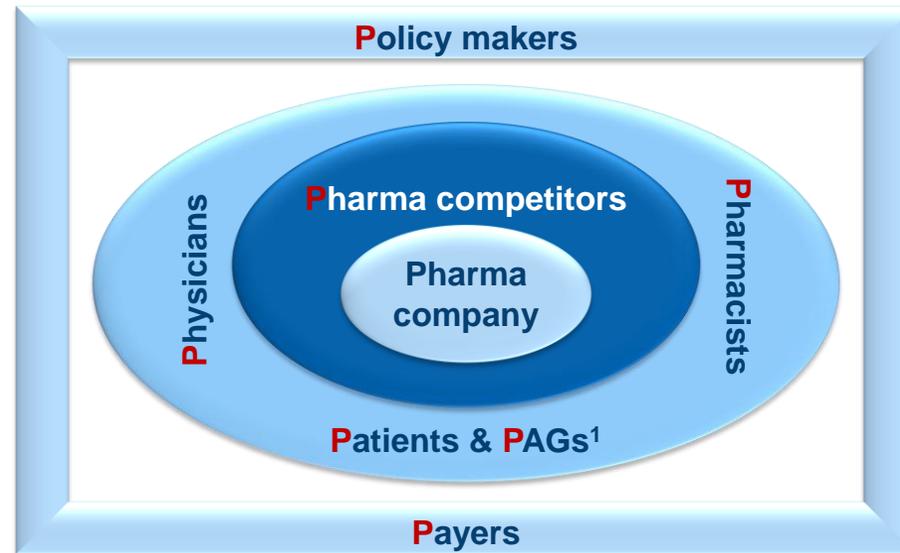
Amongst the seven key pharma market groups of stakeholders, the influence of two of them - the patients and the patients advocacy groups - has recently increased

Importance of patients & PAGs¹ in the pharma business model

Patients

- Patients are becoming more **aware and knowledgeable** (medical information is easily accessible on the Internet)
- Their **power is increasing** with digital technologies, social networks and the support of PAGs
- Patients are **more demanding**:
 - They want the most effective and best tolerated drugs...
 - ... that are easy-to-use...
 - ... and available at an affordable price

Key pharma stakeholder groups: The 7Ps



PAGs

- Patient organizations are also **more influential**
- They exert a **growing power of influence** and may be part of the policy-maker / payer decision-making processes
- Thus, **PAGs can support pharma companies** they have partnered with if they adhere to their strategy
- On the contrary, they can **damage the corporate reputation** of companies with which they do not have good relationships and with which they do not share the same strategic vision

“The patient voice gaining power and reach, it is going to play an increasing role on corporate reputation and will impact the products all along their life cycle”

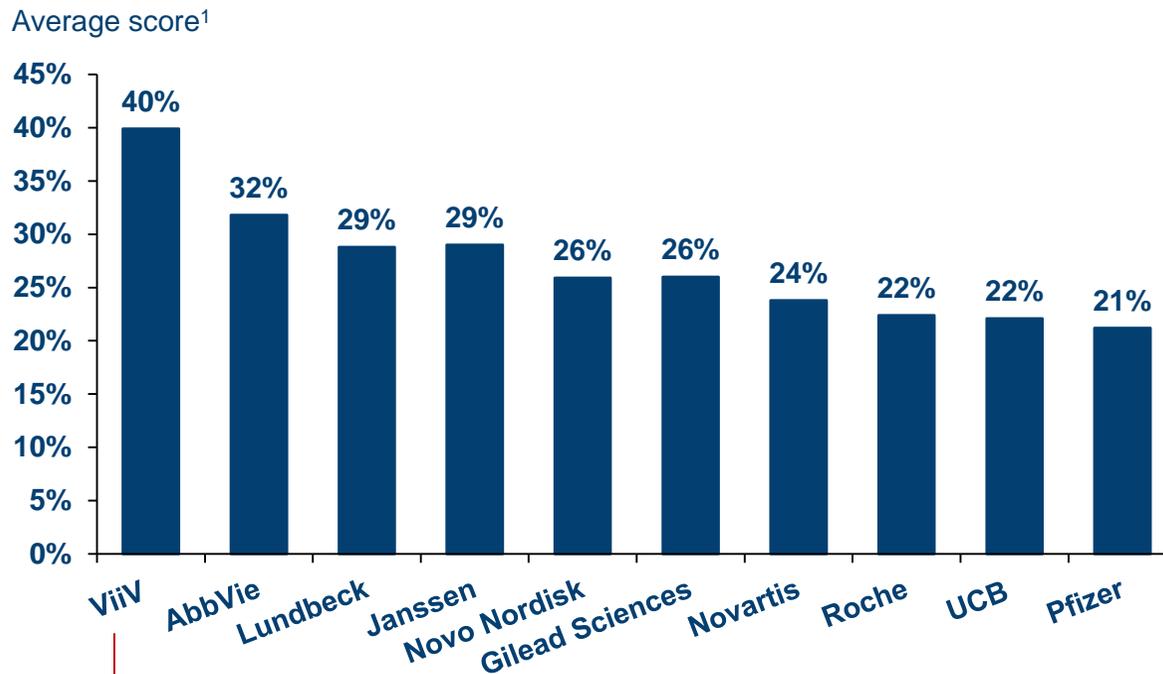
Source: Smart Pharma Consulting

¹ Patients advocacy groups

A recent survey has shown that pharma companies having the best reputation, from the patient perspective, are very active in supporting patient-centric projects

Pharma company reputation assessment by patients (2015 – 2016)

Corporate reputation – Ranking of the 10 performers



ViiV has built strong relationships with patients by funding numerous patient-centric projects to support communities affected by HIV, across the world, especially in Europe and Africa

- The **corporate reputation** of pharma companies from the patient perspective has been assessed through **six indicators**:
 1. Patient centricity
 2. Patient information
 3. Patient safety
 4. Usefulness of products
 5. Transparency
 6. Integrity
- Patient groups **opinion** is mainly **driven by**:
 - Number and value of **new drugs**
 - **Post-patent expiry strategy** (e.g. pricing, generics defense initiatives, etc.)
 - **Mergers & Acquisitions** (e.g. financial / tax optimization vs. strategic rationale)
 - Drug **pricing** and **market access**
 - **Corporate behaviors** (e.g. transparency, ethics, etc.)

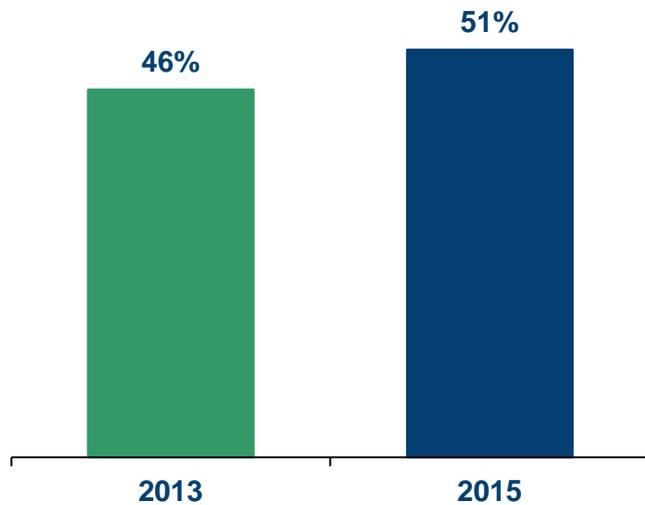
Source: PatientView 2016 (1,075 patient groups from 72 countries have been interviewed from November 2015 to January 2016 to assess 48 pharma companies)

¹ The average score is obtained by adding and averaging the percentage scores (i.e. percentage of patient groups stating that the company is "best") attained by the companies across the six indicators of corporate reputation

According to pharma companies executives, patient-centric capabilities are slightly improving while they offer a large variety of patient-centric services

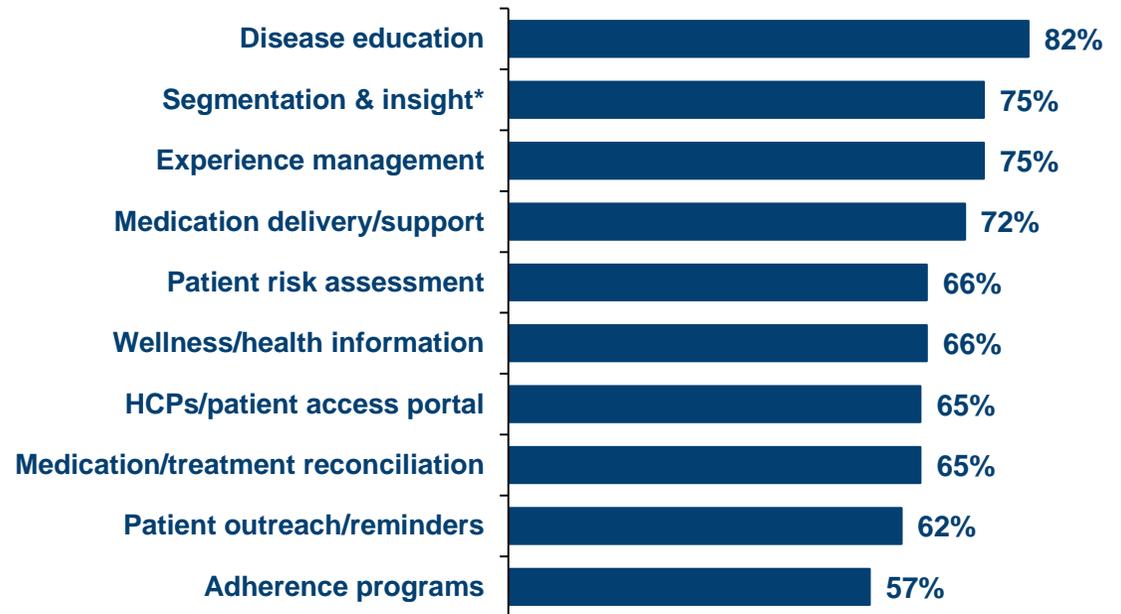
Patient centricity viewed by pharma companies (2016) (1/2)

Patient-centric capabilities with pharma companies



% of respondents rating capabilities as strong

Top 10 patient-centric services offered by pharma companies



% of respondents having cited these services amongst the top three

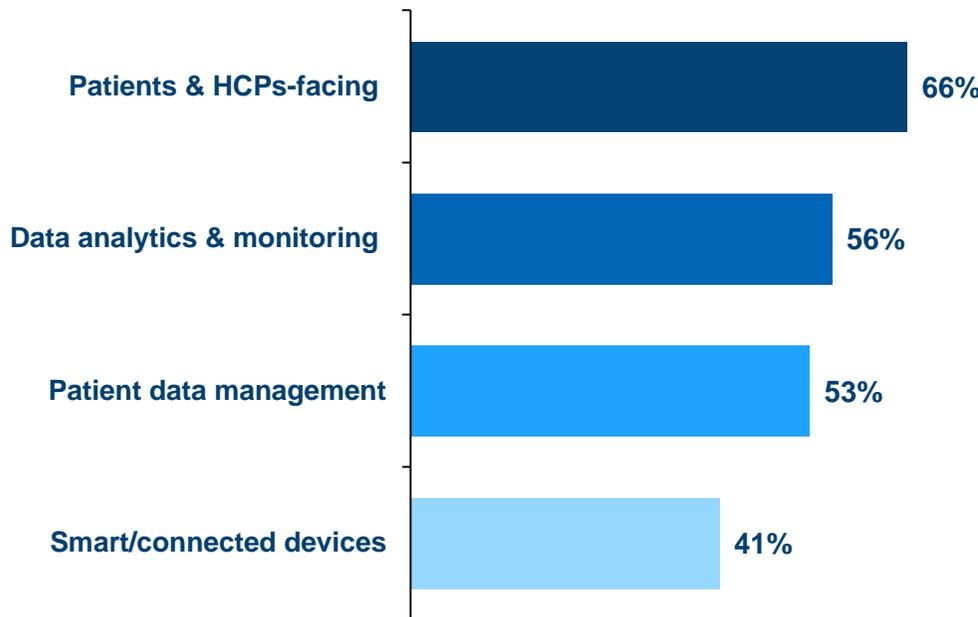
Source: Accenture 2015 Survey regarding Patients Services delivered by pharmaceutical companies (interviews of 203 pharma executives based in the USA and Europe) – Smart Pharma Consulting analysis

* Refer to the segmentation of patients into groups sharing the same behavioral profile to better fulfil their individual needs

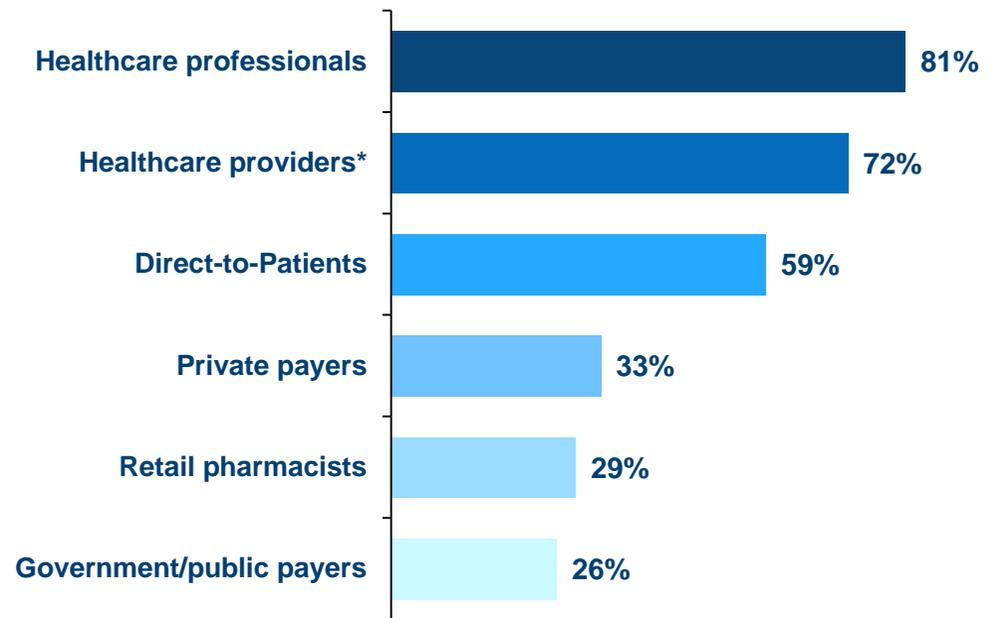
Pharma companies will invest in digital technologies and data analytics to support their initiatives while increasing patients awareness through various channels

Patient-centricity viewed by pharma companies (2016) (2/2)

Patient engagement technologies



Patient awareness & communication channels



% of respondents having stated they will invest in the next 18 months
 (95% of respondents said that their company will invest
 in these technologies to support their patient-centric initiatives)

% of respondents having ranked these channels amongst
 the top three to make patients aware of their services

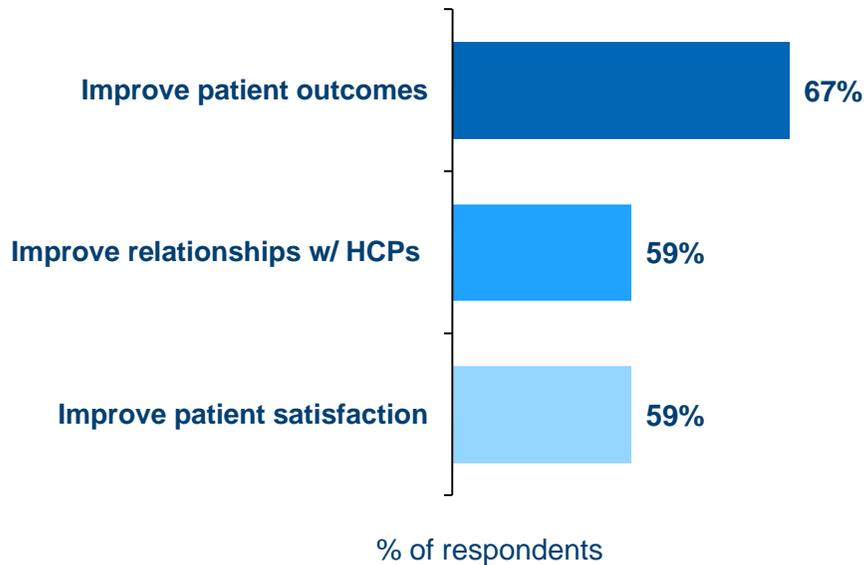
Source: Accenture 2015 Survey regarding Patients Services delivered by pharmaceutical companies (interviews of 203 pharma executives based in the USA and Europe) – Smart Pharma Consulting analysis

* Hospitals, clinics, etc.

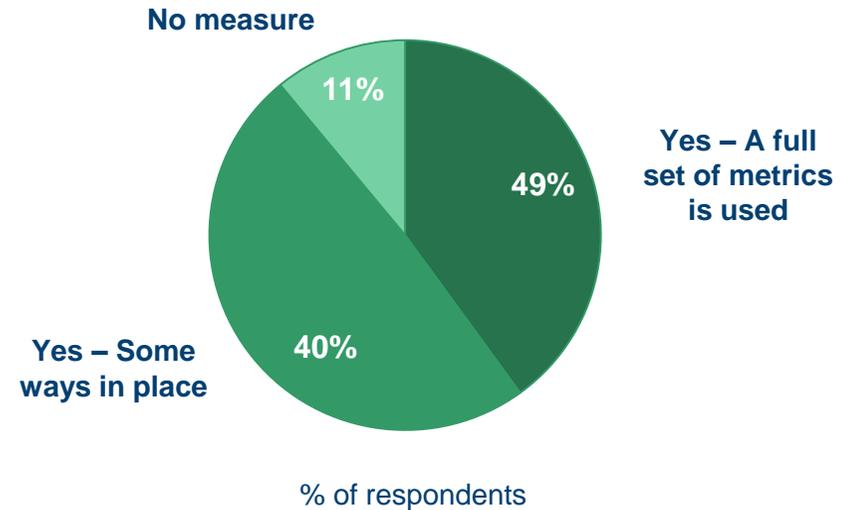
Offering patient services is a good decision, provided these services are actually used and they demonstrate their positive impact with the help of reliable metrics

Objectives & impact measurement as viewed by pharma companies (2016)

What are your objectives in offering patient services?¹



Are you able to measure the impact of these services?¹



- Offering services is a good start, but it is not sufficient
- Pharma companies must prove with tangible and reliable data that the patient services they invest in have a positive impact for the patients and create value, in return, for the company

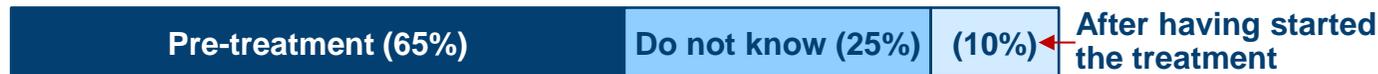
Source: Accenture 2015 Survey regarding Patients Services delivered by pharmaceutical companies (interviews of 203 pharma executives based in the USA and Europe) – Smart Pharma Consulting analysis

¹ Multiple responses are allowed

Patients need support before being treated, knowing that their greatest frustration is not having been notified of being at risk for a condition

Greatest patient needs in terms of services (2015)

Which stage was the most frustrating for you, based on the level of care and service received from healthcare professionals?



Which of the following challenges or frustrations have you experienced before diagnosis?



% are the aggregated average across all services areas

Source: Accenture 2014 – 2015 online survey of 10,000 patients from the US, the UK, France, Germany and Brazil – Smart Pharma Consulting analysis

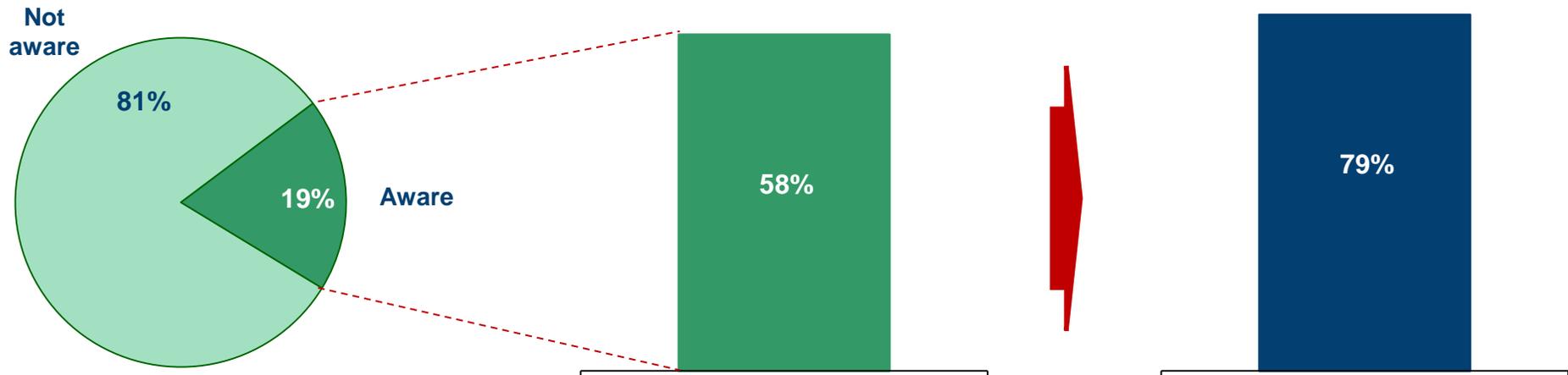
Patient awareness regarding services available to help them is low, but when they are aware, they use them and are in general very satisfied

Awareness – Usage – Valuation of patients services (2015)

Patient awareness regarding services available to them

Patient aware having used services

Patient having rated the services as extremely or very valuable¹



% are the aggregated averages across all services areas

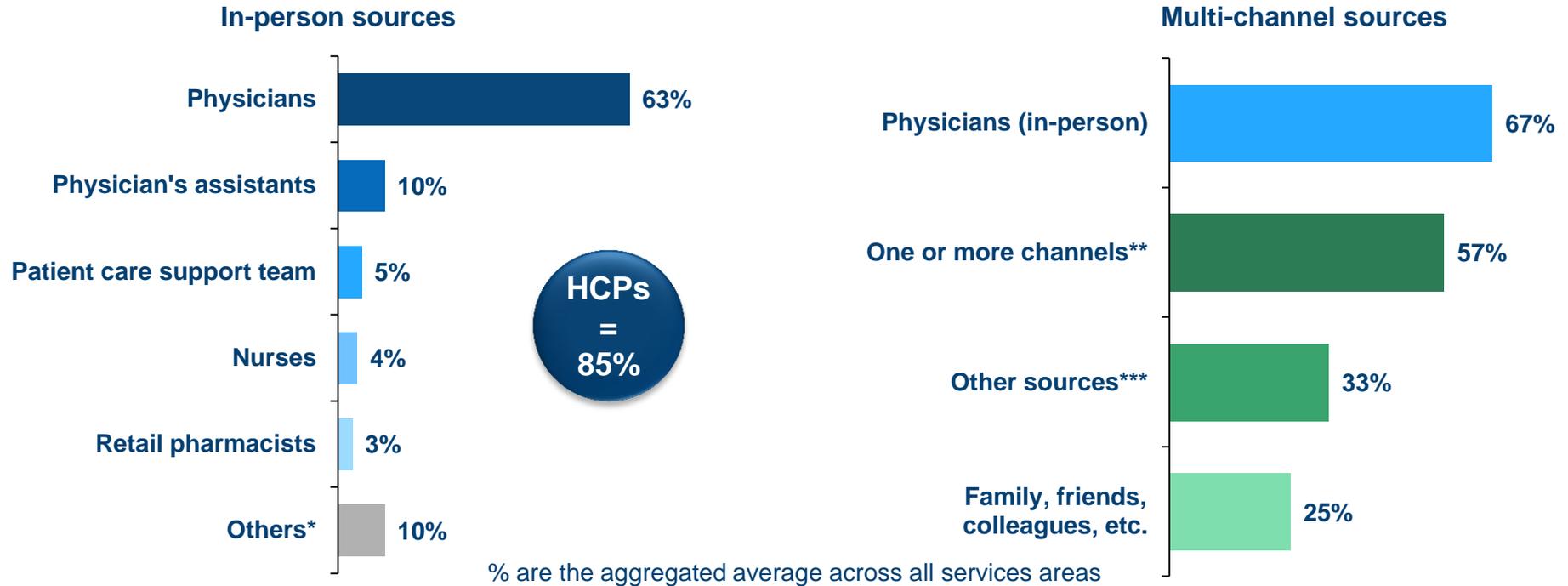
If services are associated with products marketed by pharma companies, the latter may expect to gain trust and respect amongst stakeholders (e.g. policy makers, payers, HCPs, PAGs)

Source: Accenture 2014 – 2015 online survey of 10,000 patients from the US, the UK, France, Germany and Brazil – Smart Pharma Consulting analysis

¹ Corresponds to 8.7% of the total number of patients interviewed

Most patients want to be informed by healthcare professionals on the services they need to manage their health, but digital channels also play a key role

Sources of information on services needed by patients (2015)



87% of patients want one point of contact to help them manage their health condition

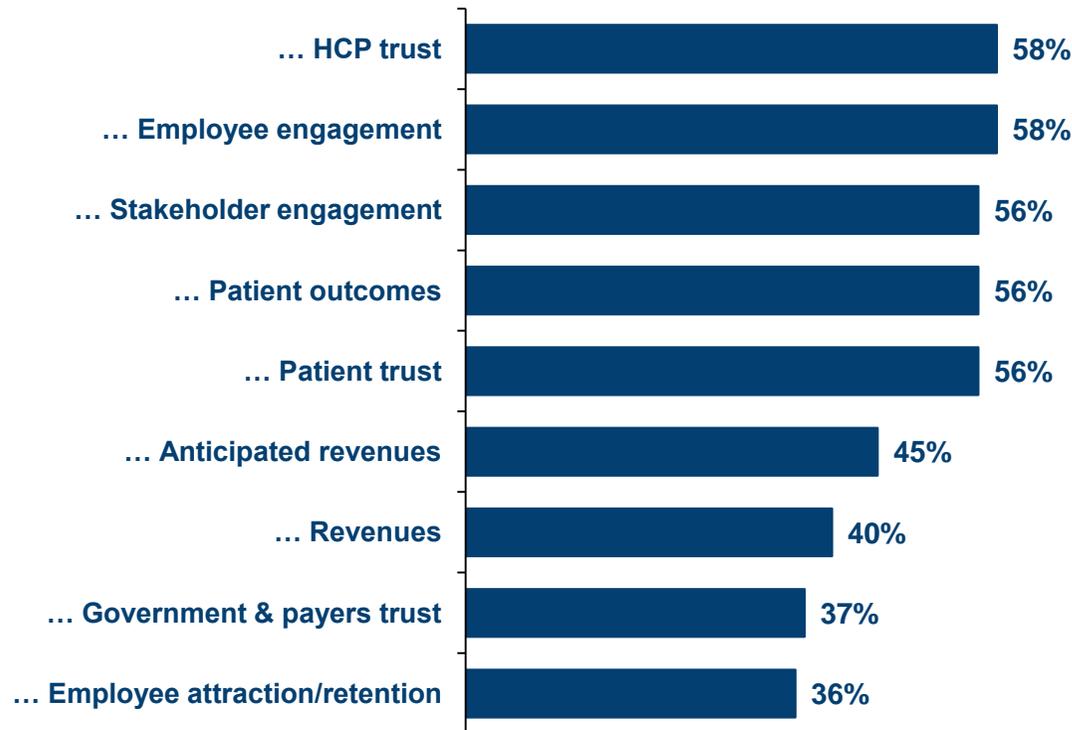
Source: Accenture 2014 – 2015 online survey of 10,000 patients from the US, the UK, France, Germany and Brazil – Smart Pharma Consulting analysis

* Insurance company, pharma company – ** Including digital channels such as: medical websites, online communities - *** Including books, magazines

There is a growing body of empirical evidence to support the fact that patient-centric initiatives may have a positive impact on pharma companies profitability

Impact of patient services on pharma companies profitability (2016)

93% of the 2,346 respondents believe that patient-centric strategy improves the overall pharma companies business outcomes by increasing...

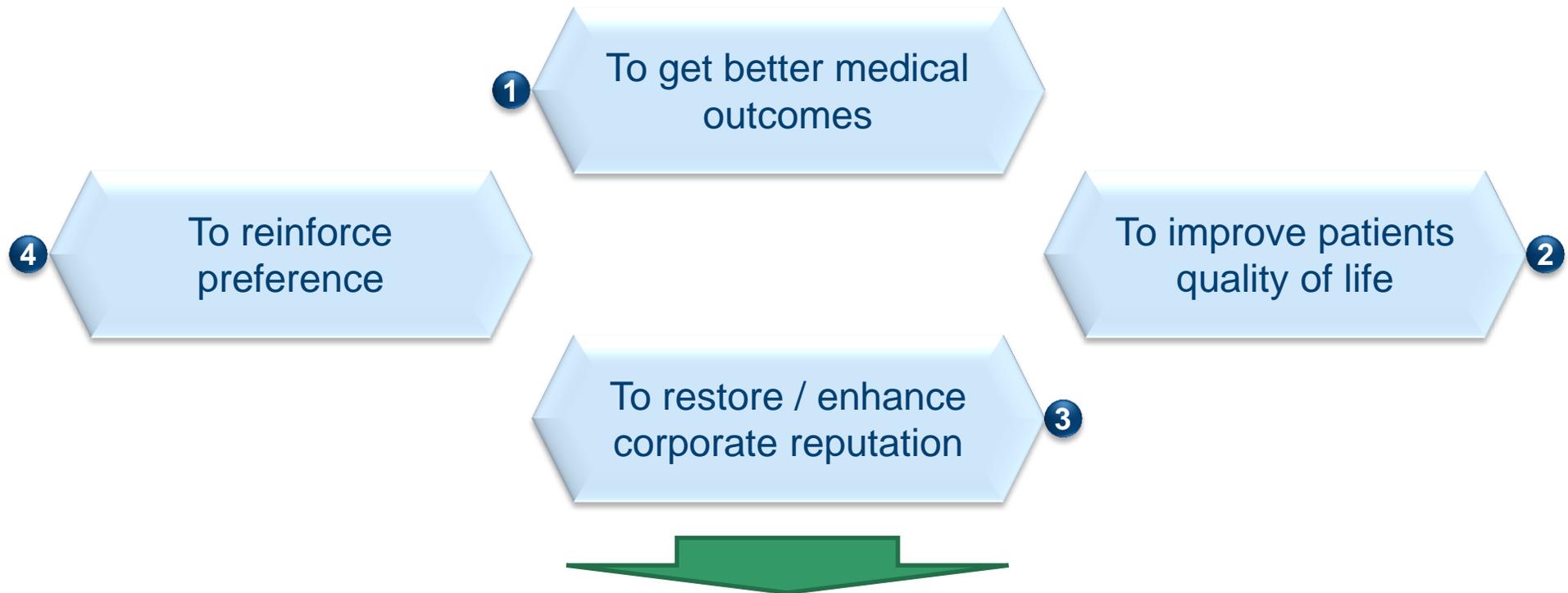


- **Patient-centric strategy** and the corresponding offered patient services **should**, in principle, **fulfil**:
 - **Patient ultimate needs** for better health outcomes and improved quality of life
 - **Pharma company needs** for a better usage of its drugs and an increased patient satisfaction leading to an enhanced corporate reputation and a market share gain
 - **HCPs needs** to prescribe the most appropriate drugs to their patients with the assurance of having a follow up along the patient journey for better results and safety conditions
 - **Policy makers** and **Payers needs** for improved public health management and better value for money, respectively
- **The issue for pharma companies** is not anymore to wonder if they should offer patient services...
- ... but to **decide which services** they want to offer to **create the best value** for patients, for HCPs, for policy makers, for payers, and ultimately for themselves

Source: Eyeforpharma, Aurora Project: "Pharma's Global Patient Centricity Survey & Analysis" 2015 – Insights collected from 2,346 respondents from 84 countries, including pharma companies' executives, patients and patient groups, solution providers, etc. – Smart Pharma Consulting analysis

Relevant and effective services to patients can contribute to improve the corporate reputation of pharma companies and thus increase stakeholders preference

The four key objectives of patient services



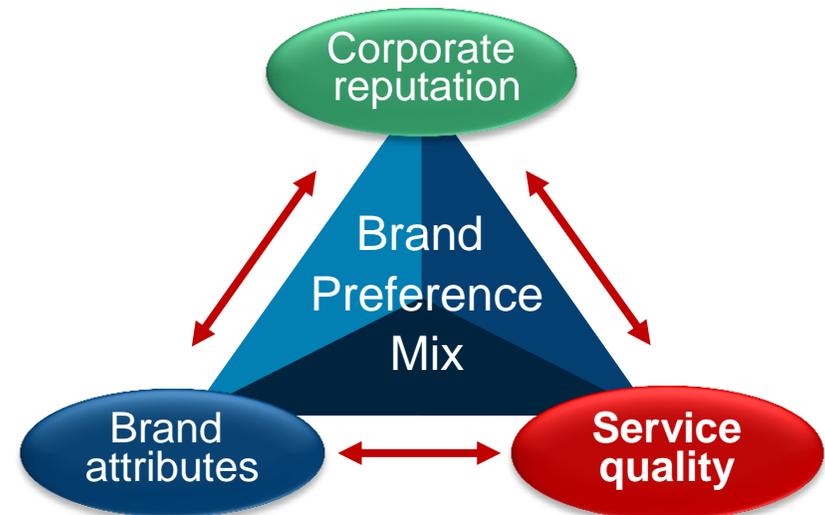
**“Why is the patient so important?
Simply because he is the final customer and, as such, has the last say!”**

With dwindling product differentiation, patient services contribute to strengthen the brand preference of stakeholders (e.g. patients, physicians, policy makers, payers)

Contribution of patient services to brand preference strengthening

“The more robust the brand preference the more exceptional the brand performance”

- To strengthen the preference of customers (stakeholders) to their brands, pharma companies must, better than their competitors, optimize the three basic components of the preference mix:
 - Corporate reputation
 - Brand attributes
 - Quality of customer services (incl. patient services)
- Thus, patient services ensuring a more positive patient experience will lead to:
 - Patients better medical outcomes and quality of life
 - Physicians (and other HCPs¹) increased confidence in the brand
 - Policy makers (and governments) better fulfilment of their role in terms of efficient management of public health
 - Payers better value for money



“Offering valuable services to customers – especially to patients – reinforces corporate reputation of pharma companies and preference to their brands”

Source: Smart Pharma Consulting

¹ Health care professionals such as: pharmacists, nurses, etc.

Patient services strategy should preferably focus on “around-the-pill” services, likely to strengthen brand preference by improving medical outcomes and quality of life

“Beyond-the-pill” vs. “Around-the-pill” strategy

- While **most pharma companies** claim to be patient-centric and to offer patient services, they are **not very clear, nor aligned on what to do in practice**: Should they provide services “beyond-the-pill” or “around-the-pill”?

Services “beyond-the-pill”

- They are not directly linked to the drugs marketed by pharma companies and therefore have no direct impact on their value, nor on their preference
- They are viewed as a **new source of revenues** to compensate risks associated to drug patent expiries
- Example of services “beyond-the-pill”:
 - Commitment of GSK to reinvest 20%¹ of its profits made in LDCs² and to lower drug prices³
 - Co-development of smart lenses⁴ by Novartis and Google
 - Roche taking majority stake in Foundation Medicine, which develops solutions for genomic profiling of cancers

Services “around-the-pill”

- “Around-the-pill” services can be adjacent or directly linked to drugs marketed by pharma companies
- Their **purpose** is to **optimize medical outcomes and patient quality of life while strengthening the preference of the brands** marketed by the companies
- Examples of services “around-the-pill”:
 - Trainings/tools to help physicians prescribe the right drug to the right patient
 - Programs/tools to improve adherence to medication
 - Devices to monitor treated patient condition

- Services “beyond-the-pill” correspond to a longer-term strategy for which the business model is not yet clearly set...
- ... while services “around-the-pill” should deliver short-term results through a better usage of marketed drugs

Source: Smart Pharma Consulting

¹To improve healthcare access to people – ²Least developed countries – ³Prices of patented products are capped at no more than 25% of their UK or French price and as low as their manufacturing cost to increase patient access and then grow on a strategic segment disregarded by competitors – ⁴This next-generation contact lens technology will be used for presbyopia, to monitor glucose levels via the tears of diabetics, amongst different treatment areas

Patient services, as part of pharma companies customer-centricity strategy, should be focused on initiatives to enhance medical outcomes and quality of life

Examples of “Around-the-pill” services

Disease management & progression monitoring



In 2014, Biogen partnered with PatientsLikeMe to distribute Fitbit¹ to 248 MS² patients to collect data to help them create improved treatment protocols and prove the value of their medication to payers, physicians and other patients

Connected-device to improve adherence



In 2014, Merck launched a new device to inject Rebif, for patients with MS², which collects and stores data that can then be sent to a secure server. The system can prompt patients to a better **adherence** to treatment

Community web site for lung cancer patients



After completing a patient research survey, AZ co-developed with >100 patients a website dedicated to build a community for lung cancer patients where they can share their emotional journeys and everyday experiences and thus feel better

Patient support program



Cornerstones4Care[®] is an online service from Novo Nordisk providing diabetic patients with personalized tools, resources and information to help them reach their diabetic management goals and improve their quality of life

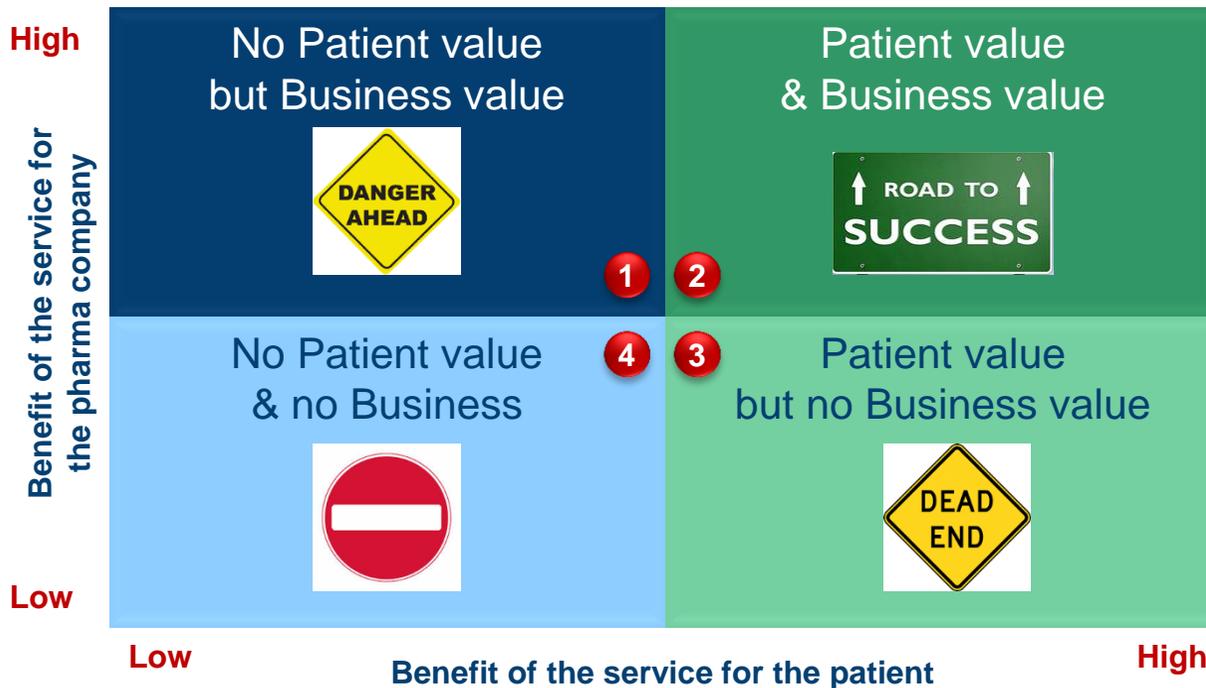
Source: Smart Pharma Consulting

¹ A wearable activity tracker – ² Multiple Sclerosis

While crafting their strategy, pharma companies should give the priority to services that create tangible value for patients and that contribute to boost their performance

Selection of a patient-centric strategy (1/2)

Patient service strategy matrix



- While crafting their patient-centric strategy, pharma companies should **keep in mind their ultimate objective:**
 - The services which create value for the pharma company but not for the patients (quadrant #1) are not recommended because they represent a short- to mid-term reputational risk for the company
 - **The services which create value for both patients and the pharma company (quadrant #2) should be favored because they represent a “win-win” option**
 - The services which create value for patients but not for the pharma company (quadrant #3) should either be excluded or redefined if the problem comes from poor implementation
 - The services which do not create value for patients nor for the pharma company (quadrant #4) should be avoided because they are irrelevant

“Patient-centric strategies must improve patients & companies outcomes”

The “win-win” patient-centric strategies proposed by pharma companies should create value for all stakeholders, be perfectly carried out and deliver tangible results

Selection of a patient-centric strategy (2/2)

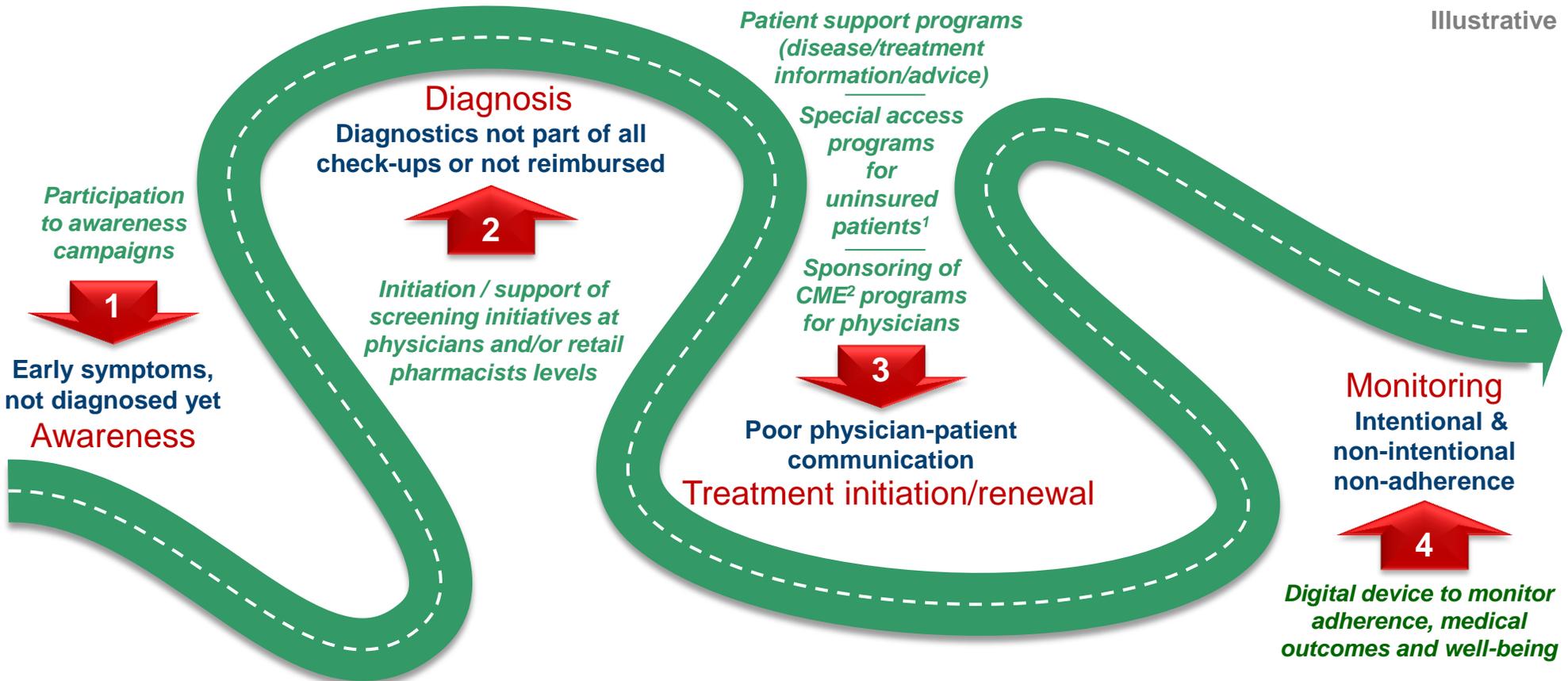
Features of services delivering value for patients & pharma companies



- The service should **correspond to a need expressed** by the great majority of patients and acknowledged by the other key customers of the pharma company (i.e. HCPs, policy makers, payers)
- Thus, the patient service must **create value** for:
 - **Patients** through **better medical outcomes** and **improved quality of life**
 - **HCPs** through **better** and **easier management** of their patients
 - **Payers** through improved **cost-effectiveness** results
 - **Policy makers / government** through **improved public health outcomes and management**
 - **Pharma company** by **reinforcing its reputation, increasing the preference of stakeholders** to its brands
- The service must be reasonably easy to implement¹ and the quality of execution irreproachable
- The expected results on patients must be significant and measurable

Services likely to be proposed to patients by pharma companies can be considered at different steps of the patient journey to address dysfunctions in patient management

Examples of possible patient services along the patient journey



In red: Key steps during the patient journey, In blue: Opportunities of improvements, in green: Examples of possible patient services

¹ In the USA, pharma companies help poorer patients fund their drugs through coupons and vouchers - ² Continuous medical education (e.g. Improvement of physician-patient dialogue)

It is key to make sure that the service will create value for patients, other customers and the pharma company, with the help of a specific assessment tool

How to select patient services?

Patient service assessment tool

Illustrative

Targeted patients	Who?	How many?	Objective	For patients	Description of the service
				For company	

Estimated value ... for Patients	 for HCPs		... for Payers / Policy makers	
Metrics*	Rationale	Metrics*	Rationale	Metrics*	Rationale
Interest	1 2 3 4 5	1 2 3 4 5		1 2 3 4 5	
Usefulness	1 2 3 4 5	1 2 3 4 5		1 2 3 4 5	
Convenience	1 2 3 4 5	1 2 3 4 5		1 2 3 4 5	
Execution	1 2 3 4 5	1 2 3 4 5		1 2 3 4 5	
Total	1 2 3 4 5	1 2 3 4 5		1 2 3 4 5	

Feasibility	Rationale	Patients KPIs ¹	Company KPIs	Decision	Rationale
Technical	 • Implementation	<ul style="list-style-type: none"> • Biological indicators • Medical outcomes • Quality of Life • MPR² • Etc. 	<ul style="list-style-type: none"> • Corporate reputation • Brand Preference Mix index • Brand market share • Etc. 	GO	
Regulatory	 • Compliance				
Economic	 • Estimated cost and return			No GO	

* 1 & 2 below competitors – 3 as competitors – 4 & 5 above competitors

The successful implementation of patient-centric initiatives requires to adjust the organization, communicate extensively and measure the impact in a rigorous way

Key challenges: Overview

The three challenges to be addressed to successfully implement patient-centric initiatives

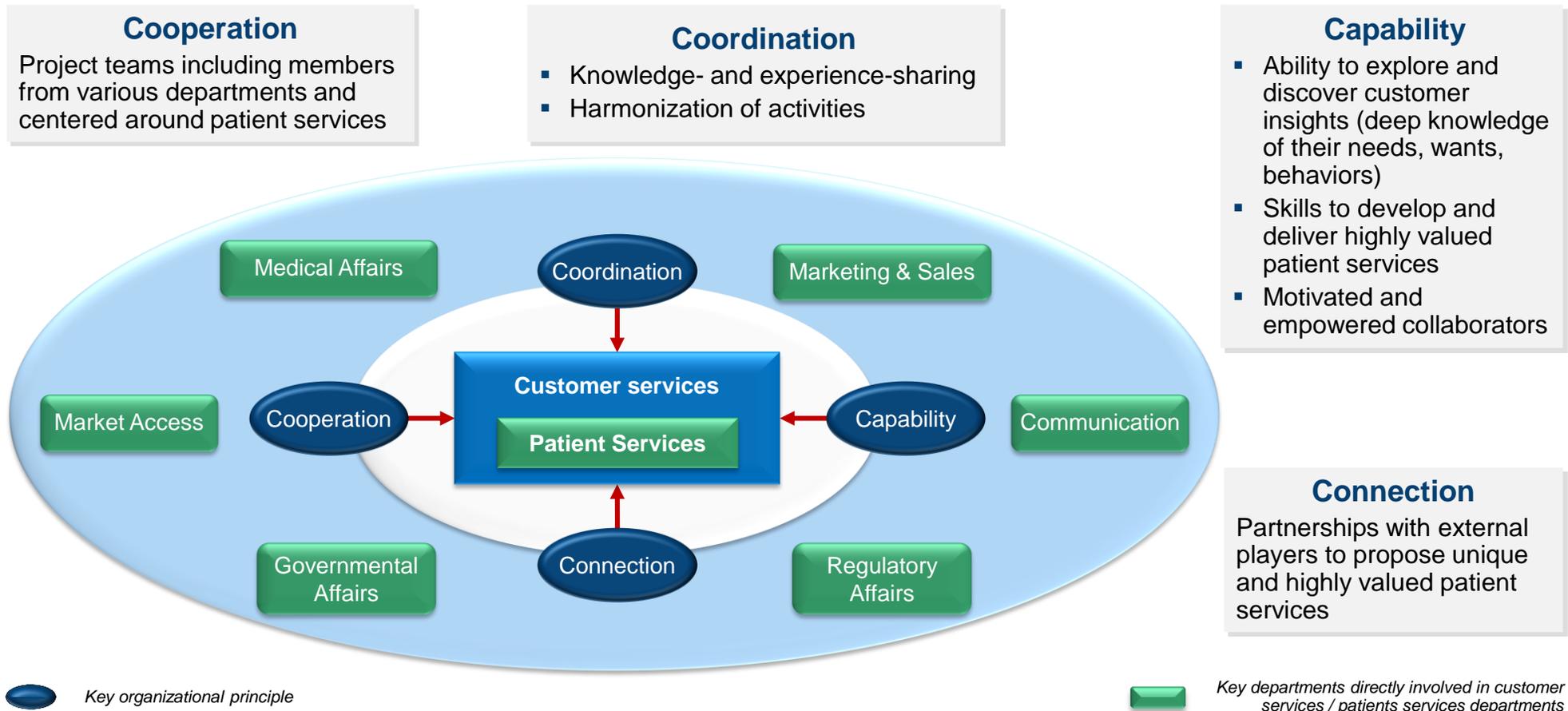
Organization	Communication	Execution & Measurement
<ul style="list-style-type: none"> ▪ Patient-centric initiatives are most often managed by the marketing or medical department... ▪ ... which is not necessarily the optimal option to establish a cross-functional team... ▪ ... which is a “must have” to ensure an effective and efficient implementation 	<ul style="list-style-type: none"> ▪ 81% of pharma companies go through healthcare providers to make patients aware of their services... ▪ ... but only 19% of patients are aware of patient services proposed by pharma companies ▪ Patient services (that are in general free) may be viewed by stakeholders as a means to sell more drugs 	<ul style="list-style-type: none"> ▪ Patient services are often complex and poorly executed ▪ 60% of pharma companies do not measure the impact of their patient services on medical outcomes ▪ In the absence of reliable data and systematic measurement, the investment made will not be valued by stakeholders and... ▪ ... therefore will not be sustainable

“The question is not anymore: Should we offer patient services, but which ones to offer and how to do it?”

Source: Smart Pharma Consulting – Accenture 2014 and 2015 surveys regarding Patients Services

A patient services department, managed by a senior executive, should be defined to work cross-functionally with other departments to develop high value initiatives

Key challenges: Patient-centric organization (1/2)

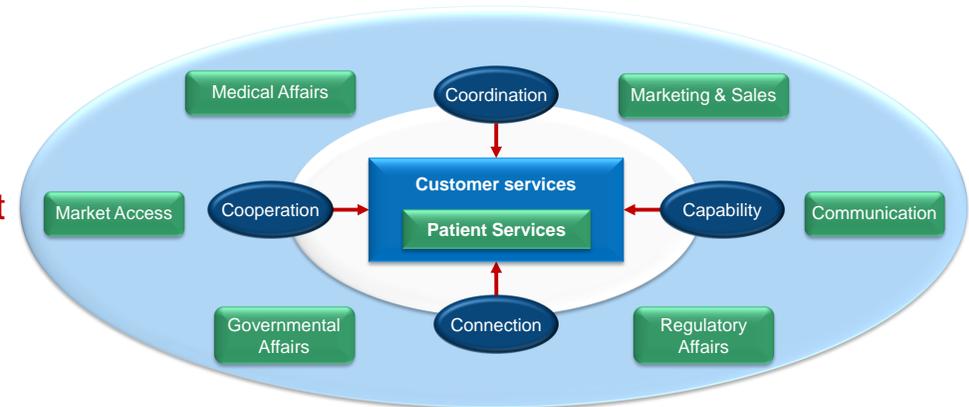


Source: Smart Pharma Consulting – Adapted from R. Gulati (HBR 2007)

A customer-centric mindset should be pervasive at every level of the organization, from customer-facing collaborators to the management committee level

Key challenges: Patient-centric organization (2/2)

- A **patient-centric strategy** must be **communicated** without any ambiguity – internally and externally – by the senior management as a **long-term priority**
- **To remain engaged** in a patient-centric culture, **collaborators** should regularly be **kept informed** about the initiatives put in place and their outcomes
- The **head of the customer (or patient) services department** must be a **member of the management committee** and **work cross-functionally** with the other key department heads of the company (e.g. medical, marketing, etc.)
- Besides, collaborators dedicated to patient services must be **part of the brand teams** to ensure that the services benefit not only to patients but also to the brand, directly, or indirectly by reinforcing the corporate reputation
- Irrespective of the department they belong to, of their activities (front vs. back office) or of their experience (senior vs. junior position), **all collaborators** of pharma companies should **be committed to deliver high service quality** to customers, and especially to patients



“Patient services being in general delivered in partnership with other customers (e.g. HCPs, PAGs) of the pharma companies, they require all departments to be perfectly aligned and coordinated”



Key organizational principle



Key departments directly involved in customer services / patients services departments

It is essential for pharma companies to communicate their patient-centric strategy clearly and precisely to internal and external customers, in order to get their support

Key challenges: Communication

- Pharma companies should **define and share** their **vision – mission – ambition** related to their Illustrative customer-centric strategy with their internal (their collaborators) and external customers (their stakeholders)

Vision

- Being recognized by patients and other customers (HCPs, payers, policy-makers) as the company offering the most valuable patient services*

Mission

- Improve medical outcomes and quality of life of patients treated with our drugs or affected by a pathology for which we propose solutions*

Ambition

- Get tangible results demonstrating the value of the patient services offered and, as a result, increase the preference of stakeholder for our marketed brands*

“Communicate openly about your patient services: What are your intentions? What are the results you obtained?”

“Do not be afraid, if you do the right things right, your reputation will be strengthened!”

Patient services being complex to execute, skillful collaborators, with a solid experience in project and transversal management, are required

Key challenges: Execution & Measurement (1/2)

Patient services execution

- **Challenge #1:** **Engage** HCPs, payers and policy makers, as appropriate, **to execute patient services**
- **Challenge #2:** **Make patients aware** of the services offered and of the benefits they will get
- **Challenge #3:** **Keep patients**, as users, and other relevant customers¹, as partners (e.g. HCPs may recommend a website, enroll patients in adherence programs, track the clinical outcomes, etc.) **engaged** over the long run in the proposed services
- **Challenge #4:** **Collect reliable data**, on a regular basis, to be able to **objectivize** the **value** brought by services to patients, other customers¹, and to the pharma company
- **Challenge #5:** **Collaborate with** many **partners**, internally (from different departments) and externally (social networks, data integrators, apps developers, HCPs, etc.) to deliver the services
- **Challenge #6:** **Position the patient services** to **avoid head-to-head** competition with other companies
- **Challenge #7:** **Execute the services** to **create superior** value than competitors, in a context of commoditization of patient services

Rigorous measurement of relevance, quality of execution and outcomes of patient services is essential to objectivize the value created for stakeholders

Key challenges: Execution & Measurement (2/2)

Patient service measurement tool

Targeted patients	Who?	How many?	Objective	Description of the service					
				For patients	For company				
Customers valuation									
Metrics*	Patients	HCPs	Payers / Policy makers	Rationale					
Interest	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5						
Usefulness	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5						
Convenience	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5						
Execution	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5						
Total	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5						
Pharma company self-valuation									
Metrics*	Rationale								
1 2 3 4 5									
1 2 3 4 5									
1 2 3 4 5									
1 2 3 4 5									
1 2 3 4 5									
Patients KPIs ¹			Gap analysis	Recommendations	Company KPIs ¹			Gap analysis	Recommendations
Metrics	O ²	A ³			Metrics	O ²	A ³		

¹ Key performance indicators – ² Objective – ³ Achievement

* 1 & 2 below competitors – 3 as competitors – 4 & 5 above competitors

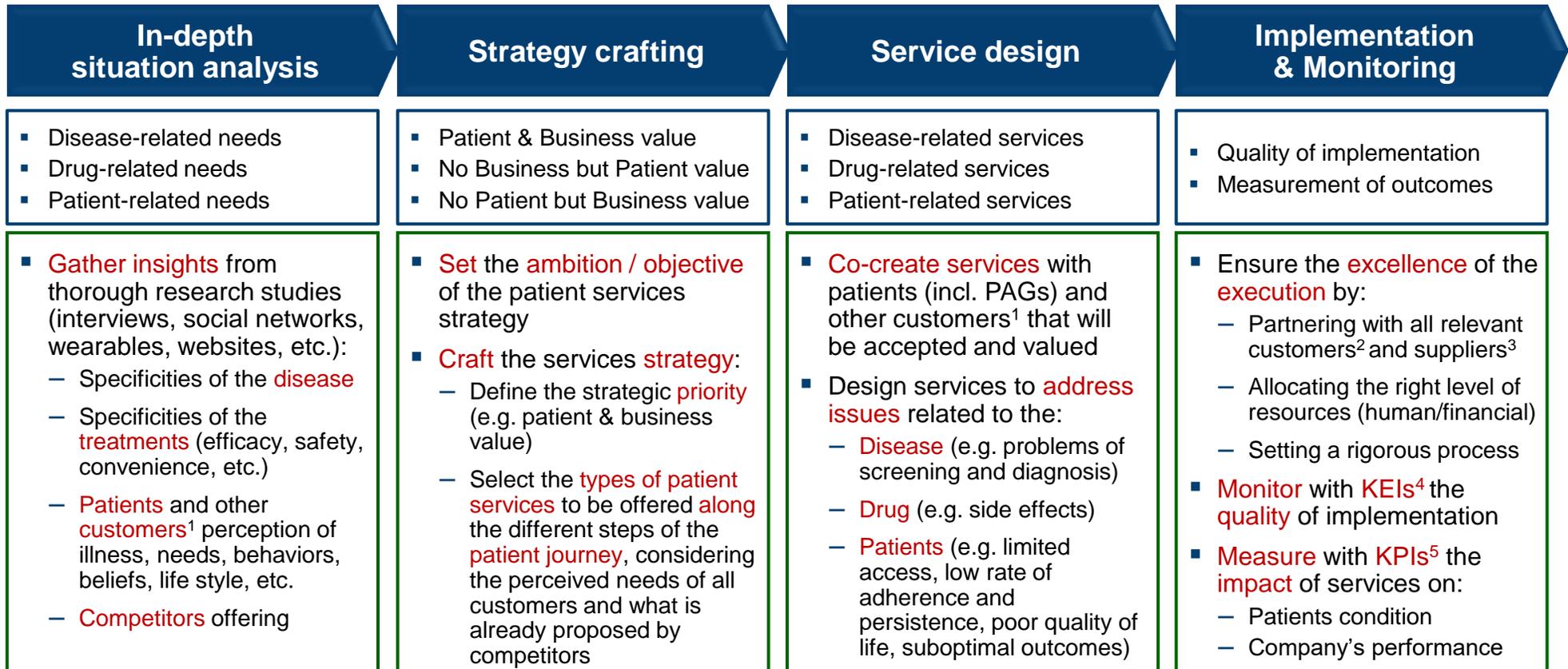
“If you can’t measure it, you can’t manage it”

– Peter Drucker –

- To **objectivize the value** created by patient services, for the different customers and the pharma company, it is recommended to **combine qualitative and quantitative metrics** to **measure** the quality of **execution** and the **impact** of the initiatives:
 - **Interest** and **usefulness** metrics to assess the **relevance** of the service
 - **Convenience** and **execution** metrics to assess the **quality of implementation** of the service
 - **Patients** key performance indicators (**KPIs**) including metrics such as: medical outcomes, quality of life, adherence and persistence rates
 - **Pharma** key performance indicators including metrics such as: corporate reputation, Brand Preference Mix Index¹, market share dynamics
- The **performance gaps** (between objectives and achievement) should **be carefully analyzed** and **lead to specific decisions** (i.e. adjustment of the execution, drop-out, continuation)

Smart Pharma Consulting proposes a four-step process to define and implement a patient-centric strategy likely to create a sustainable competitive advantage

Strategic patient services process

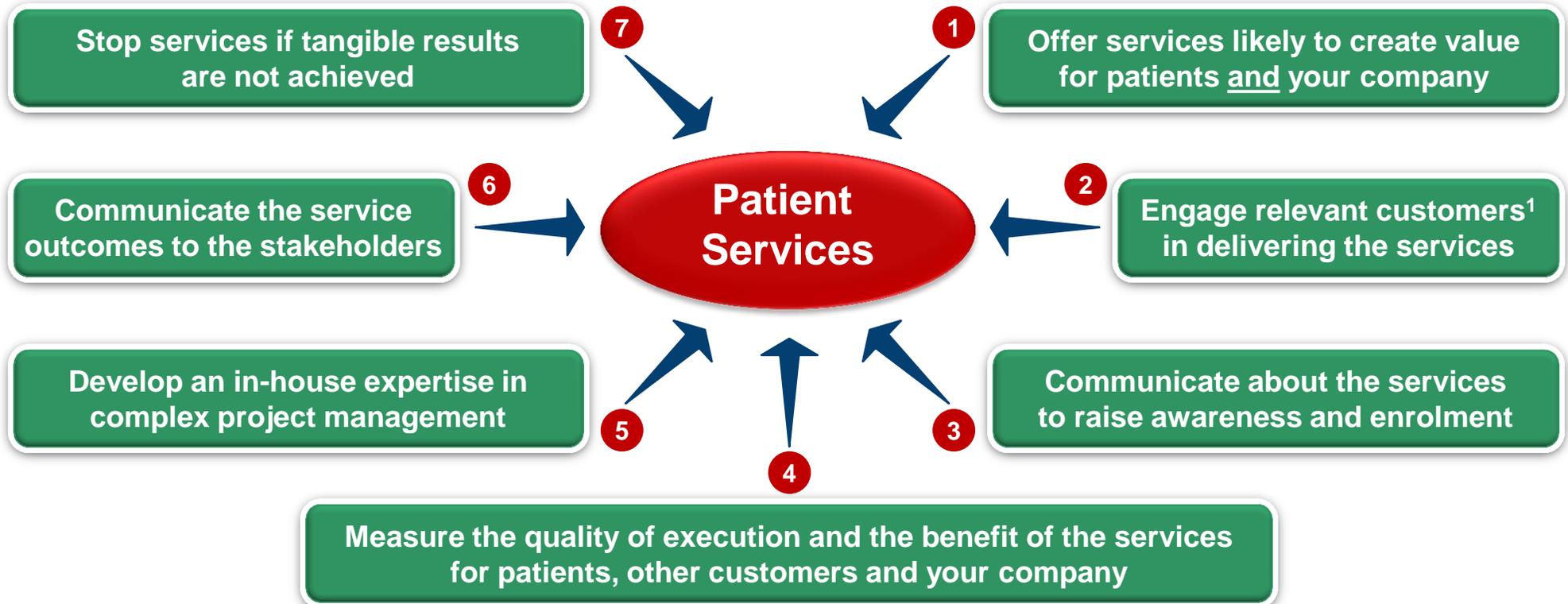


Source: Adapted and enriched by Smart Pharma Consulting from Executiveinsight

¹ HCPs, payers, policy makers, etc. – ² PAGs, HCPs, payers, policy makers, caregivers, etc., depending on the service to be proposed – ³ IT companies, data integrators, E-health agencies, etc. – ⁴ Key execution indicators – ⁵ Key performance indicators

Patient services must deliver significant and concrete results to get stakeholders esteem and therefore enhance their preference for the pharma company and its drugs

7 tips to create and implement a patient-centric strategy



“The right patient-centric strategy maintains a proper balance between the patient and the pharma company interests”

Source: Smart Pharma Consulting analyses

¹ PAGs, HCPs, payers, policy makers, etc.

Smart Pharma Consulting can help you strengthen the impact of your patient-centric strategy by stimulating your thinking process and bringing specific methods and tools

5 ways Smart Pharma Consulting can boost your patient-centric strategy



Source: Smart Pharma Consulting

Consulting company dedicated to the pharmaceutical sector operating in the complementary domains of strategy, management and organization

Core capabilities

1 Strategy

- **Assessing the attractiveness of markets** (Hospital / retail innovative products - Vaccines - OTC - Generics)
- **Growth strategy**
 - Optimization of marketing / sales investments
 - Development of a company in the hospital market Business
 - Valuation for acquisition
 - Portfolio / franchise assessment
- **Extension of product life cycle performance**
 - Improvement mature products performance
 - Adaptation of price strategy
- **Defense strategies vs. new entrants**
- **Competitive strategies in the hospital market**
- **Strategic partnerships companies / pharmacies**

2 Management

- **Facilitation and structuring of strategic thinking for multidisciplinary product teams**
 - Key challenges identification
 - Strategic options formalization
 - Resource allocation optimization program
- **Training of marketing and market research teams to sales forecast techniques (modeling and scenarios development)**
- **Development and implementation of a "coaching program" for area managers**
 - Sales reps coaching
 - Regional action plans roll-out
- **Development and implementation of a "sales techniques program" for sales forces (STAR¹)**

¹ Sales Techniques Application for Results (training courser)



3 Organization

- **Rethink of operational units organization**
- **Improvement of sales force effectiveness**
- **Improvement of the distribution channels covering the hospital and retail markets**
- **Development of a strategic planning process**