

# PATIENT ENGAGEMENT 2.0

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# KEY TRENDS DRIVING THE NEXT-GENERATION OF PATIENT ENGAGEMENT

## KEY TREND 1:

### THE PATIENT IS IN THE DRIVER'S SEAT

The days of passive healthcare consumers are over. According to a Health Affairs study, patients who were more involved in making decisions related to their health had 5.3 percent lower overall medical costs and 12.5 percent fewer hospital admissions. Patients with rare diseases have long played a crucial role in educating and advocating for themselves. But patients today – no matter their ailment – want to understand lab results, hear directly from physicians about possible challenges, and participate in the decision-making process when it comes to determining treatment. Today's healthcare are demanding to have access and tools to their medical information whenever they need it. The patient will now be in the center of the drug manufacturing process.

Only **30%** of health care organizations have instituted tools or practices in customer experience.



# KEY TRENDS DRIVING THE NEXT-GENERATION OF PATIENT ENGAGEMENT

## KEY TREND 2:

### THE PATIENT IS THE NEW SHOPPER

Patients are humans – humans who have the same tendencies and preferences as consumers. They shop on Amazon, order rides on Uber, and watch movies on Netflix. It is because of companies and experiences like these that patients have set new, higher expectations when it comes to their interactions with a brand. People crave the same

level of personalized service and want to enjoy a frictionless experience, regardless of industry. Healthcare is no different; it has to measure up. Experiences across all channels need to be easy, personalized, timely, and bring value to the patient at that moment, or they will choose another brand.



# KEY TRENDS DRIVING THE NEXT-GENERATION OF PATIENT ENGAGEMENT

## KEY TREND 3: THE PATIENT IS INFLUENCED BY MANY STAKEHOLDERS

Doctors are no longer the sole care provider. Today, many stakeholders are influencing and supporting the patient. These stakeholders could be other healthcare professionals, such as specialty doctors, nurses or health coaches who have frequent interactions with the patient. But they could also be outsiders – from friends or family giving advice to acquaintances or even strangers on social media offering recommendations about providers or treatments.

A PwC survey found that 42 percent of people visit social media review sites before choosing a provider or making healthcare decisions, and more than 40

percent state that social media impacts provider selection. With the rising cost of healthcare, these influencers are becoming more important than ever. Engagement in healthcare requires a multi-faceted approach, enabling all care team members to communicate in an efficient and cohesive way.

More than **80%** of individuals ages 18–24 would be likely to share health information through social media.

Source: Social media “likes” healthcare



# KEY TRENDS DRIVING THE NEXT-GENERATION OF PATIENT ENGAGEMENT

## KEY TREND 4:

### AS PHARMA BECOMES SPECIALTY, NEW CHALLENGES ARISE

According to Janssen Biotech, U.S. regulatory approvals of specialty drugs have accelerated in recent years and approvals and spending are expected to continue to increase. By 2020, 90 percent of top-selling medications will be specialty. Though valuable, there are significant concerns about the cost of specialty drugs, with perhaps one of the biggest being prescription

adherence. The Annals of Internal Medicine found that 20 to 30 percent of prescriptions are never filled, and 50 percent of medications are not taken as directed. The impact of these numbers is astounding, accounting for approximately 125,000 deaths in the United States each year due to lack of adherence.

Specialty drugs accounted for **27%** of the pharmacy industry's revenues in 2015.

Source: 2020 Outlook for Specialty Pharmacy Revenues



# KEY TRENDS DRIVING THE NEXT-GENERATION OF PATIENT ENGAGEMENT

## KEY TREND 5: CX MAKES THE DIFFERENCE

With so many me-too products in the market, healthcare and pharma marketers need to get creative in order to break through the noise and build patient loyalty. In our fast-paced world, customer experience rules the day. Walker's Customers 2020 study finds that by the year 2020, customer experience will overtake price and product as the key brand differentiator. A positive customer experience can favorably impact sales,

and is increasingly viewed as a key business goal – so much so that the compensation of executives and line of business leaders is now being tied to CX. But, if an interaction is negative, the damage to a brand can be irreparable. It has become the new “Reason to Believe,” forcing brands to look at emerging technologies and offerings to strengthen brand value proposition.



Companies that excel at customer experience  
grow revenues **4-8%** above the market.

Source: Customer Experience - Five Disciplines

# RE-IMAGINING ENGAGEMENT IN HEALTHCARE



Brands must adopt a number of different strategies to address these trends in order to truly re-imagine engagement in healthcare. First, they should acknowledge that patients are in the driver's seat by implementing an empathy-driven approach. Second, it is imperative that Healthcare brands address patients as more than just patients but also shoppers. This means implementing innovative communication methods in order to create better experiences. Brands must also prioritize orchestrated engagement amongst the many stakeholders influencing patients and build robust data warehouses to power omnichannel frameworks and enable Predictive Analytics. Finally, customer experience can be improved through strategic thinking that goes Beyond the Pill and truly differentiates the brand beyond clinical benefits to get to the heart of the patient.

# AN EMPATHY-DRIVEN APPROACH

According to NIH, “while empathy is (sic) the act of correctly acknowledging the emotional state of another without experiencing that state oneself .... the beneficial effects of a good patient-clinician relationship on healthcare outcomes are of similar magnitude to many well-established medical treatments.” Brands must prove to patients that they are empathetic at every stage of their healthcare journey. “Moments of need” are make-or-break moments during which a patient has heightened expectations or an emotional or rational need that must be addressed by a brand. They can be derived from patient journey research and integrated, patient-specific insights received throughout the journey. These critical moments could come at the pre-diagnosis stage, when individuals are left feeling uncomfortable because of the unknown. They could come during the specialist cycle – the period in which the patient visits multiple doctors and is frustrated due to lack of progress. Or they could come post-diagnosis, as the patient is just beginning their treatment and is feeling overwhelmed and alone. These “moments of need” can be addressed by health brands by leveraging true omnichannel communications, centered around bite-sized and highly visual content (similar to social posts), delivered in a personalized way to the patient leaving them feeling comfortable and confident in their treatment.



# INNOVATIVE EXPERIENCES

Next, engagement must be fueled by innovation. To rival Amazon and Facebook and provide the needed personalization, AI-powered content (e.g. predictive content) should be used in engagements.

**Over 50,000 people globally watched a surgery through VR.**

Source: Healthcare uses of VR

Moreover, as most of the content for patients is educative in nature, immersive technologies like Augmented and Virtual Reality can capture the patient attention and greatly increase message retention. AI can also enable concierge-like conversations using Chat Bots or voice-activated interactions using Voice Assistants, like Alexa or Siri.

**Global market for VR in healthcare is projected to be \$3.8 billion by 2020.**

Source: Virtual Reality (VR) in Healthcare Market Trends





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# ORCHESTRATED ENGAGEMENT

Because of the multiple stakeholders influencing patients, engagement must be orchestrated and coordinated across all platforms and amongst all influencers. Communication and engagement must be seamless and consistent across all channels and stakeholders. An Aberdeen Group study finds that companies with the strongest omnichannel customer engagement strategies retain an average of 89 percent of their customers, compared to 33 percent for organizations with weak omni-channel strategies. Messaging on each channel should be different but reinforcing. Patients will feel confusion and frustration if mixed messages are being sent. This can also lead to a patient being unclear of their treatment or therapy.

**“Moving to true patient engagement requires a more contextualized understanding than what is leveraged today to diagnose and treat patients.”**

Four Technology Priorities For US Healthcare, Forrester Report

More than ever, data is the backbone of successful patient engagement. In many ways, engagement can be viewed as a data exchange: data is provided to the patient in the form of content, in return the patient sends data back through measurable actions. Unfortunately, as the patient experience is fragmented and often outsourced to third party companies, health brands are challenged to aggregate data to extract meaningful, actionable insights. Hence the importance of a robust data strategy and the need to build smart data warehouses, which can integrate structured and unstructured data from a variety of sources: claims, hub services, call centers, CRM, program analytics, social

listening, etc. This approach allows marketers to get a 360 degree view of the patient, but also use Machine Learning models and Advanced Analytics to predict outcomes.

McKinsey estimates that big data analytics can enable more than **\$300B** in savings per year in U.S. healthcare.

Source: Big data analytics in healthcare: promise and potential





## CASE STUDY: AN EMPATHETIC APPROACH TO PATIENT ENGAGEMENT

For patients with prostate cancer, the side effects of hormonal therapy can often be more devastating than the diagnosis. Between loss of libido, cardiovascular risks and muscle atrophy, many men question if treatment is worth it. Pharmaceutical company AbbVie was committed to helping men manage their symptoms and keep their spirits high as they navigated their prostate cancer treatment journey. Exercise is crucial in managing many of these symptoms, but during treatment, a lot of men don't have the stamina or the desire to go to the gym. So AbbVie created The Man Plan, which gave patients everything they needed to follow a specialty-designed workout program to help manage their symptoms. The Man Plan kit included a DVD, manual, exercise bands and access to a digital portal where patients could access step-by-step workout plans. A Certified Exercise Physiologist automatically tracked each patient's progress, and special counselors personally called participants and sent new exercise bands when they were ready to progress to the next level. The Man Plan online community also provided added support from other patients. Pilot program enrollment goals far exceeded initial expectations and the program was later rolled out nationally. Demand and adoption of The Man Plan has stretched across the U.S., proving the importance of supporting the patient beyond the treatment.





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