

Specialty Products: New Products Dictate Consideration of Patient Treatment Pathways



Rose Fishman,
BScPhm
Vice President
McKesson Specialty
Pharmaceutical
Solutions



Jean Michel Coutu,
BScPhm, MBA
Account Manager
McKesson Specialty
Pharmaceutical
Solutions

As pharmaceutical companies continue to broaden their portfolios with specialty products*, the usual tried-and-true launch strategy of broadcasting key messages to physicians and patients is no longer sufficient.

Specialty products require a patient-centric, customized strategy to realize optimal market value. As the best-selling business strategy book *Blue Ocean Strategy* states: “Untapped value is often hidden in complementary products and services.”

Providing a positive patient treatment experience

In the traditional marketing paradigm, the physician is top-of-mind and patients often become the forgotten stakeholder. Because the patient’s treatment journey is considerably more complex for specialty drugs, it is essential to ensure the needs of patients are met. They need the right support to ensure their access to and compliance with treatment.

The first step towards devising a strategy that provides optimum value to all stakeholders is to break down what is called “the patient pathway” (Figure 1). We define the patient pathway as the healthcare process for all patients from disease origination to treatment compliance. Naturally, every disease state and product will have a somewhat different patient pathway. However, a few activities are common as patients proceed from one phase to another. Consider the following questions, each of which illustrates a challenge for patients in a particular phase of the pathway:

- How do I get reimbursement for this product?
- Can my local community pharmacy dispense this?
- In the case of a drug requiring infusion or specialized administration: where do I get this product administered?

It is only once all the patient’s product needs within disease state have been mapped out that a product strategy can be developed to leverage every touchpoint. In addition, this will uncover all the tangential considerations that will drive the strategy, such as:

- distribution type,
- dispensing services,
- administration requirements,
- coordination of care and
- feedback to physicians, *etc.*

These are all individual levers to optimize a patient-centric model.

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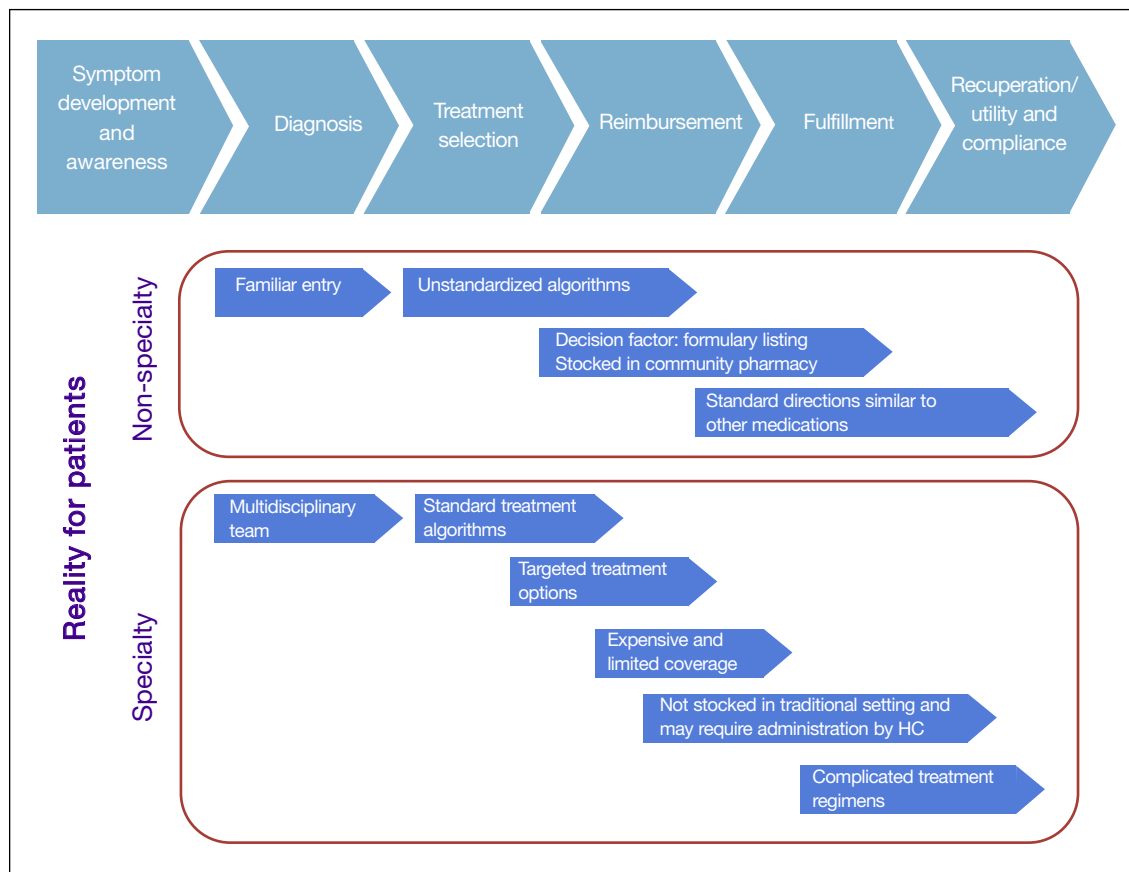


Figure 1. The patient pathway.

Finding the right distribution model

As Anne Miao, Director of Business Development, McKesson Canada SPS says: “When a drug is used for a much smaller population, manufacturing production runs are proportionally fewer. On top of this challenge, the newer drugs are biotechnological molecules, usually with a shorter shelf life, less stability and difficult manufacturing processes. Smaller production runs also require tighter inventory management and control to ensure sufficient drug is available for those who need it.”

Whether a cold chain, closed distribution network or a hybrid distribution model, a pedigree distribution model that controls the amount of inventory contained in the distribution pipeline prevents any bull-whip effect and feeds data back to product managers in real time. This is paramount for high-cost specialty

products. Moreover, distribution no longer means a straight line from manufacturer to wholesaler to pharmacy or hospital. Product dispensing can also become a crucial value component in the drug distribution process.

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Making specialists part of the product team

Pharmaceutical companies should look at physician specialists as an extension of the product team. Their input and endorsement can help craft an actionable and relevant product strategy. Knowing that patients are being well-managed through the patient pathway goes a long way to achieving a high degree of physician specialist loyalty. And, to further increase prescriber confidence, it is essential to incorporate feedback loops so physicians have up-to-date information on the treatment progress of their patients.

Aligning with the sales force

Specialty sales forces need to understand all components of the product and service offerings to be able to support physician specialists and to ensure maximum patient enrollment. A focused understanding and continual review of the patient pathway is essential. With a thorough understanding of the patient pathway, the sales force can further assess the relevance of services, target adjustments required to improve patient and physician experience and monitor the overall performance of the new strategy.

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Going forward, a patient-centric game plan is required

In the past, specialty products have performed well because they were niche products in an environment with few competitors. Thus, they

were able to capture the attention of a select group of specialists.

As the market becomes increasingly competitive on multiple dimensions, this marketing strategy is no longer as simple as it once was. The success of specialty products now depends on a marketing strategy that aligns the four factors discussed above with the patient pathway as the keystone. In today's competitive arena, the most successful strategies will address the patients' experience and offer value beyond product utility.

Specialty products present unique marketing challenges. However, the over-riding principle is clear: an integrated approach, which facilitates the delivery of care throughout the continuum of the patient pathway, must be the central focus. When the overall marketing strategy provides a holistic, solution-based value proposition to patients, the loyalty of all stakeholders will follow. **CPM**

* We define "specialty products" as pharmaceuticals that are high in value, which may require special administration considerations and/or require non-standard handling, storage and distribution.

For more information about specialty products, contact:

Rose Fishman at 1 (800) 811-9880 ext. 104, rfishman@phase4health.com or

Jean Michel Coutu at 1 (800) 811-9880 ext. 423, jmcoutu@phase4health.com.

McKesson Specialty Pharmaceutical Solutions is a division of McKesson Canada that offers outsource medical information, medical writing, pharmacovigilance and direct-to-patient services to the pharmaceutical industry.