

A New Foundation for Designing Winning Brand Strategies

The Patient Journey Re-envisioned

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Medicine has been described as a "science of uncertainty and an art of probability." The same can be said of marketing—particularly when it comes to developing the foundation of the brand strategy—the patient journey. The patient journey is a powerful framework for understanding the market and designing winning strategies. However, several practical issues in building and using the patient journey have limited marketing teams in harnessing the potential of this concept.

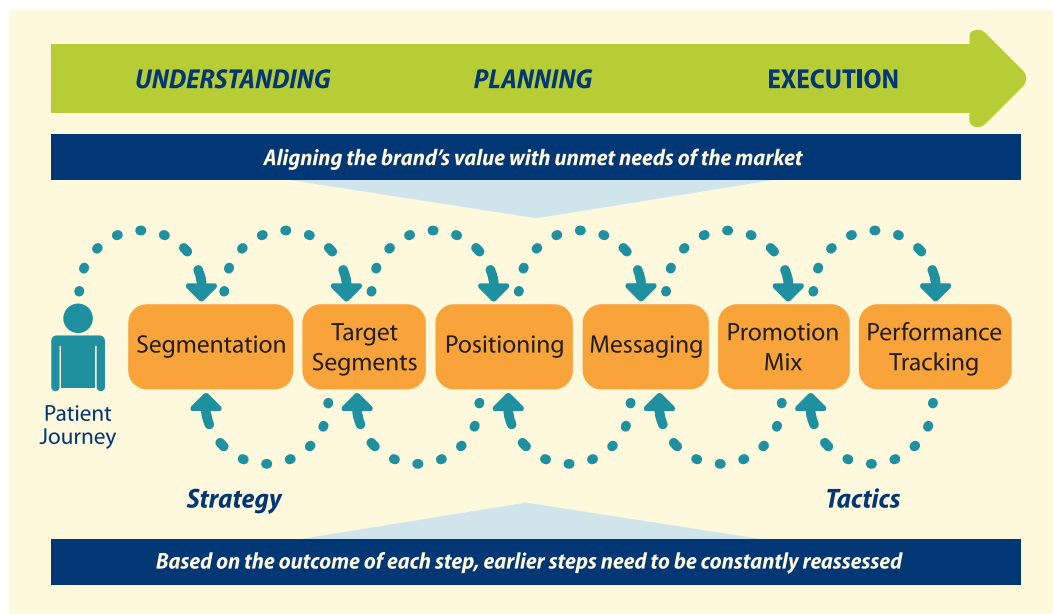
decisions, and the emotions felt. A comprehensive depiction of the patient journey will provide both quantitative data surrounding each milestone on the journey as well as qualitative data on what patients, caregivers, and providers are thinking and feeling along the way. It lays the foundation for the brand strategy and informs downstream decisions, including segmentation and targeting; product positioning and messaging; and physician, patient, and payer engagement models as seen in the figure below.

Importance of the Patient Journey

The patient journey is a description of how patients experience a disease or condition from their first awareness of symptoms through all stages of presentation, diagnosis, referral and treatment, fulfillment, monitoring, adherence, and follow ups. At each juncture along the way, it reflects the decisions made and hurdles faced by patients and providers, the rationale behind those

Polling from a recent IMS patient journey webinar indicates that incorporating the “physician, payer, and patient into a single view” and “quantifying the journey” remain the biggest challenges in the industry.

Recent IMS Health research suggests that nine out of ten brand teams do not use the latest practices for building and using patient journeys, leaving gaps in market understanding or strategy execution and ultimately yielding sub-optimal brand performance.



Using a combination of innovative techniques, including real-world evidence analysis, social media listening platforms and projective techniques, brand teams can uncover unmet needs, spot growth opportunities, and position their product in a way that resonates favourably with providers, payers, and patients.

A New Journey of Discovery

Ideally, a description of the patient journey will extend from disease awareness through final treatment, covering not only the current situation, but also how the treatment paradigm is likely to evolve in the next few years. And, it will not only reveal what happens and how often it happens, but why it happens — both from the physician's and the patient's perspective. Furthermore, once the patient journey is built, the brand team needs to know where to add value and how to tell if the brand is winning.

Getting such a comprehensive view requires combining multiple research sources and methods. A few of these are discussed below.

Real-world Evidence

- It is now possible to use a wealth of real-world evidence to create a rigorous, granular, and comprehensive patient flow map from diagnosis through adherence. Drawing from an array of robust databases that incorporate information on millions of de-identified patients and thousands of physicians and payers, one can quantify the treated patient population and various market dynamics. In addition to providing a standardized framework that is easier to refresh than primary research, it provides the most accurate view of actual patient behaviours.

Social Media Listening Platforms

- The Internet and social media have become key influencers. At a minimum, companies can “listen in” to public conversations conducted via online forums to get a sense of what is on patients' minds. Ensuring, of course, that all laws and privacy guidelines are followed, companies can gain more systematic insight into conversations conducted in social media through data aggregators. These companies scan social media key words, which are then coded and analyzed for trends.

Importance of Emotional Drivers for Patient and Physician Behaviours

- Experiences, opinions, and decision-making exist in two domains: the rational and the emotional. Often, individuals are unaware of the important emotional drivers of their behaviours, as many act on a subconscious level and influence the more easily observed rational processes. However, it is essential to get to the underlying emotional themes that drive patient and physician decisions, but it is generally necessary to use less direct research techniques to do so. One recommended solution is to use projective techniques as a research tool with patients and physicians. Projective techniques can be used to discover how patients and physicians experience a disease, the treatment process, and their relationship to one another from an emotional (and often subconscious) perspective.

Connecting Objectives, Strategies, and Tactics and Tracking Performance

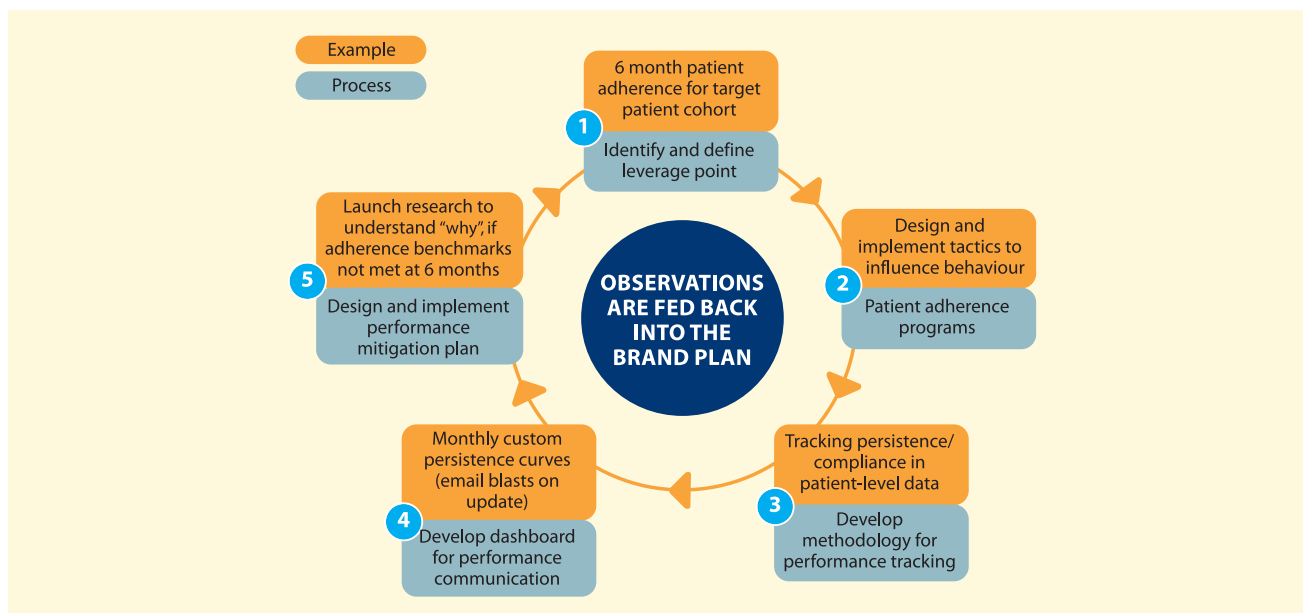
- Most pharmaceutical companies do a satisfactory job of identifying and prioritizing behavioural objectives in the patient journey. However, when it comes to laying out action plans behind these behavioural objectives, we have seen several brand teams falter. Many times the patient journey effort is stopped prematurely after the behavioural objectives are identified. In reality, aligning on the behavioural objectives is just the foundation to winning in the marketplace.

Recommended Approach to Building and Using the Patient Journey

The following methodical approach will allow you to take full advantage of the patient journey in meeting your business objectives:

1. Understand “What,” “Why,” “How Often,” and “How Will it Evolve”

As discussed above, first ensure that the patient journey presents a realistic and comprehensive view of how the patient “flows” through the health care system and includes the “whys” that drive behaviour as well as a view of how the future is likely to unfold. Use a rich



combination of social media listening platforms, targeted primary and projective research, and epidemiological, diagnostic, script, longitudinal patient level, and claims data to answer these questions. Then, analyze the journey for what it reveals about the unmet needs, drivers, and barriers to a patient’s progress through all the stages of their experience – today and tomorrow.

2. Align on “Where to Add Value”

Identify points in the patient journey that can be leveraged to ensure that the brand will win in the marketplace of tomorrow and develop realistic but challenging objectives for the brand by being innovative and holistic at the same time. These goals might be, for instance, to increase awareness rates, decrease time to presentation, improve referrals, increase prescribing, increase or decrease switching, enhance fulfillment, and improve compliance or persistence. Thereafter, it is important to prioritize the objectives based on their impact on the brand and the effort needed to achieve the goal. Then, devise supporting strategies and tactics for achieving the prioritized objectives. At this stage, it is, of course, critical to ensure that those creating the tactics have the necessary expertise in pricing and market access, health economics and outcomes research, marketing, sales, and medical affairs to develop realistic tactics. Knowledge of what has worked in other launches with analog products is very useful.

3. Make Sure the “Brand Is Winning”

After developing the detailed tactics, it is important to align the methodology and definitions for performance tracking against the objectives, develop dashboards that will allow the organization to monitor its progress at a glance, and then proceed to do so with secondary and primary data inputs. Finally, feed the observations that come out of performance tracking back into the brand strategy and tactics so that potential issues can be resolved quickly and effectively.

Conclusion

Combining the latest research methodologies, real-world evidence, and insights from physicians, payers and patients will produce the most comprehensive, rigorous, and actionable patient journey possible. Such a well-designed and thoroughly researched patient journey will give companies the basic foundation for formulating a successful brand strategy. Beyond identifying the objectives for success, companies must then use a systematic process for achieving success: outlining tactics, tracking progress against those goals, and closing the loop by making adjustments to the plan as indicated. **CPM**

Excerpted from an IMS Consulting Group and IMS Health white paper published in August 2014. For further information regarding this article or to obtain an e-copy of the white paper, please contact your local IMS Brogan representative or send an email to info@ca.imsbrogan.com.