Surveying the Patient Engagement Landscape

2017 Benchmarking Report

C3i Solutions Benchmarking Program
Patient Engagement Survey Results
December 2017
EXECUTIVE SUMMARY

C3i Solutions recently completed a pharmaceutical industry benchmarking survey designed to provide a snapshot of the current patient engagement landscape for use in evaluating current programs and setting strategic direction. The survey focused on challenges, strategy, people & processes, and applicable technology.

According to the survey findings, the most pressing concerns for pharmaceutical companies regarding patient engagement are budget allocation, complying with regulations and technology capabilities to enhance patient engagement investments. The most frequently cited challenges encountered during the patient engagement programs are incomplete data and analytics, inability to track the patient’s complete journey, and ineffective patient enrollment.

As indicated by two-thirds of respondents, marketing/brand teams are primarily responsible for setting product specific engagement strategies.

Our survey finds that pharmaceutical companies are employing various patient support tactics in their efforts to create positive patient experiences and outcomes. Additionally, the increased use of digital and mobile technology has profoundly changed the way we communicate and share information. For example, tactics that were highly rated for effectiveness include multi-channel counseling, medication reminder messaging and digital health patient monitoring.

Only one third of current patient engagement programs have Health Care Professional (HCP) liaison staff or plan to use them for engagement; and more than half of patient engagement programs do not incorporate motivational interviewing techniques or intrinsic coaching. Almost half (48%) of the respondents’ patient engagement programs do not include a feedback loop to the prescribing physician.

Over 25% of the respondents stated that they frequently uncover adverse events or product quality complaints during patient engagements. 65% of the survey respondents stated that they have an intake process defined and are capturing cases in a validated system of record. Patient and/or caregiver program surveys are the major data source for program reporting and analytics. Only half of the programs perform patient focused predictive analytics to help anticipate and manage patients’ needs.

This benchmarking study can serve as a baseline and point of comparison for the pharmaceutical industry’s current patient engagement practices. It can be leveraged by individual organizations to compare their patient engagement programs against the industry indicators and to suggest best practices. As the industry migrates from product-centered to patient-centric care, we are predicting that effective patient engagement programs will take on a more significant role in improving patient outcomes which in turn will drive business results.
SCOPE & METHOD:

The patient engagement survey targeted global pharmaceutical professionals with direct or cursory responsibility for patient engagement, including patient support and adherence.

The thirty survey respondents include those with titles ranging from Director to C-level, in various functional areas. It was conducted online in the summer of 2017 and focused on the following topics:

- Challenges & Concerns
- Strategy & Tactics
- People & Processes
- Technology & Reporting

PARTICIPANT PROFILE & DEMOGRAPHICS:

Geography:

Survey respondents indicated that they were responsible for the major markets in North and South America, Western Europe, EMEA, and Asia Pacific.

*Note: Percentages derived from multi-select survey question; responses will total greater than 100%
**Company Size in Number of Employees:**

Well over half of the survey respondents reported working for an organization of 10,000 employees or more; 14% between 1,000 and 10,000; and almost one quarter in firms of 1000 employees or less.

![Figure 2: Company Size by Number of Employees](image)

**Primary Role/Responsibility:**

Survey respondents represent a cross-section of functional areas within their organizations. The highest percentage of respondents (36%) is from Marketing and Brand, while the remaining has primary reporting responsibility into Medical Affairs, Clinical Operations, Patient Support & Education, Sales, and others.

![Figure 3: Respondents Job Functions](image)
CHALLENGES & CONCERNS

What are your most pressing concerns regarding patient engagement?

Results show the top 3 concerns regarding patient engagement are budget allocation, complying with regulations and technology capabilities to enhance patient engagement efforts.

Figure 4: Respondents’ Most Pressing PE Concerns

<table>
<thead>
<tr>
<th>Concern</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget allocated to patient engagement/adherence programs</td>
<td>48%</td>
</tr>
<tr>
<td>Complying with regulations</td>
<td>45%</td>
</tr>
<tr>
<td>Technology capabilities to enhance patient engagement/adherence efforts</td>
<td>42%</td>
</tr>
<tr>
<td>Lack of industry best practices</td>
<td>39%</td>
</tr>
<tr>
<td>Determining the optimal patient engagement/adherence program design</td>
<td>39%</td>
</tr>
<tr>
<td>Quantifying the ROI of patient engagement/adherence programs</td>
<td>36%</td>
</tr>
<tr>
<td>Finding adverse events and implementing a process to report them</td>
<td>29%</td>
</tr>
<tr>
<td>Connecting with other partner companies, i.e. patient databases, analytics companies, etc.</td>
<td>26%</td>
</tr>
<tr>
<td>Feeding back information to healthcare professionals and office staff</td>
<td>19%</td>
</tr>
<tr>
<td>Finding experienced staff or partners for patient engagement/adherence activities</td>
<td>16%</td>
</tr>
<tr>
<td>C-Level support</td>
<td>16%</td>
</tr>
</tbody>
</table>

*Note: Percentages derived from multi-select survey question; responses will total greater than 100%

DISCUSSION:

Complying with regulations was a major concern among almost half of those we surveyed. While conducting patient engagement programs, pharmaceutical companies most consider federal, regional and local regulations. In the US, for example, identifying and properly reporting of adverse events, as well as complying with anti-kickback laws are just a few of potential regulatory concerns that can arise when dealing with patient engagement. By utilizing experienced vendor partners, properly training staff, and careful designing the program structure these and other regulations can be appropriately managed.

It is also worth noting that while the pharmaceutical industry has realized the importance of patient engagement and begun to more fully understand the patient journey, a multi-channel integrated technology solution and best practices based on designing and implementing patient engagement programs are also prominent concerns — accounting for 42% and 39% of the responses, respectively.

With the advances in digital technology and the ever-evolving healthcare landscape, patients are more engaged in their health care experiences than ever before. To achieve improved patient outcomes and better control healthcare costs, patient engagement programs need to effectively leverage industry best practices and technologies.
What are the challenges you encounter in your patient engagement programs?

According to respondents, the top 5 challenges encountered by pharmaceutical companies in their patient engagement programs are incomplete data and analytics; inability to track the patient’s complete journey; ineffective patient enrollment; technologies and capabilities; and detecting and handling adverse events. This echoes the last question’s concerns on best practices and the use of technology.

![Figure 5: Challenges encountered in PE programs](image)

**DISCUSSION:**

Though only 30% of the respondents cited Technology as a major concern, both incomplete data and analytics and the inability to track the patient’s complete journey can be solved by an effective technology platform. While patient-centricity should be the most important factor to consider when choosing a technology platform for patient engagement, the following functions/features should also be considered:

- Ability to integrate data from any system of record, to improve service delivery and performance without duplication
- A system that is highly configurable and customizable, as no two programs are exactly the same
- Built-in intelligence that automatically recommends the next-best action for the agent engaging the patient, based on relevant case data
- A 360 degree view of all patient data, available at the agent’s fingertips. This creates a cohesiveness that allows the agent to more naturally and comfortably engage with the patient on a person-to-person level.

*Note: Percentages derived from multi-select survey question; responses will total greater than 100%
What are your primary barriers to having less scripted agent-to-patient dialogue?

Survey respondents felt that internal legal review (44%), internal medical review (26%) and regulatory constraints (26%) were the biggest barriers to adopting a natural and less-scripted conversation with patients.

**DISCUSSION:**

For effective patient engagement, a strict scripting philosophy should be avoided where possible. It is important to remember that an effective interaction is one that is patient-directed, within parameters, and allows the conversation to flow from topic to topic more naturally. However, call guides should be provided to ensure that agents are working within program best practices and regulatory requirements.
STRATEGY & TACTICS:

What patient support tactics does your company employ? And which do you believe are the most effective?

Participants were asked to choose the patient support tactics they use, and then rank the effectiveness of those tactics. The top five most used tactics are Patient Access and Reimbursement, Co-Pay Offset, Non-Profit Foundation Support, Medication Reminder Messaging, and Patient Specific apps. However, when respondents were asked to rank the support tactics based on patient performance, the top performers are Access and Reimbursement, Co-Pay Offset, Multi-channel Counseling and Coaching, and Digital Health Patient Monitoring.

DISCUSSION:

As the industry is shifting from product-centric to patient-centric, patient engagement programs need to better mirror patients’ needs, behaviors, and expectations. Pharmaceutical companies are employing various patient support tactics in their efforts to create positive patient experiences. What is noteworthy from the survey is how the increased use of digital and mobile technology has profoundly changed the way we communicate and share program information. Multi-channel counseling and coaching, medication reminder messaging and digital health patient monitoring also scored significantly in program effectiveness.
However, survey results show that while about one third of the respondents employ patient support via social media channels, they score its effectiveness as low compared to other tactics. This highlights that while pharmaceutical companies are beginning to embrace the power of social media to support patients, they see the outcomes as deficient. Reasons for this may include a lack of deep social experience and expertise managing regulated brands via social media channels, failure to integrate social media support into other support channels, or they are fearful of detecting Adverse Events (AEs) in social media conversations.

**Who sets product-specific patient engagement strategy?**

Marketing/Brand departments are primarily responsible for setting product-specific engagement strategies, as indicated by two-thirds of the respondents. In some companies, departments such as Clinical Operations, Patient Communication & Education, Innovation Group, and Medical Affairs set the product-specific patient engagement strategy, but the percentage was quite small.

Figure 8: Who sets product specific patient engagement strategy?
How do you determine which brand-specific patient engagement tactics to employ?

Respondents felt that patient demographics, product attributes, and therapeutic class / disease state were the most important factors in deciding which patient engagement tactics to employ. Government and regulatory situations and payer environment are also seen as important factors.

Figure 9: How do you determine which brand specific patient engagement tactics to employ?

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>61%</td>
<td>Patient Demographics</td>
</tr>
<tr>
<td>55%</td>
<td>Analysis of Product Attributes</td>
</tr>
<tr>
<td>48%</td>
<td>Analysis of Therapeutic Class and Disease State</td>
</tr>
<tr>
<td>45%</td>
<td>Payer Environment</td>
</tr>
<tr>
<td>45%</td>
<td>Government and Regulatory Situations</td>
</tr>
<tr>
<td>26%</td>
<td>Product Price, Average Wholesale Price &amp; Formulary Evaluations</td>
</tr>
<tr>
<td>3%</td>
<td>Do not employ any brand specific tactics</td>
</tr>
</tbody>
</table>

*Note: Percentages derived from multi-select survey question; responses will total greater than 100%

DISCUSSION:

All of these factors are important when designing a patient engagement program. Consider the indications for product use, especially with regard to the severity of the disease state—is it acute or chronic? Are there periods of remission? Will the individual undergoing treatment feel worse before improving? Think about the therapy duration. Is it short term or a lifetime commitment to care? Think about how the product is administered - is it a pill or a self-injectable? Will the patient need to travel to an infusion center for treatment? Consider the severity of the side effects. Lastly, but very importantly, consider the cost of the drug, including co-insurance and co-pay, as well as transportation costs and the need for potential child care.
**How do you measure the effectiveness of patient engagement programs?**

Survey respondents were asked to select the methods they used to quantify the effectiveness of their patient engagement programs. As indicated in the following chart, the results were surprisingly equally divided amongst the given choices of HCP qualitative data, patient qualitative data, script/claims data and custom studies.

*Note: Percentages derived from multi-select survey question; responses will total greater than 100%

**DISCUSSION**

In order to truly understand effectiveness of a patient engagement program, you need to employee multiple measures, and align them to program goals. No two programs are the same. Disease state and product type need to be taken into consideration as well. Quantitative measures like prescription lift are important, but shouldn’t be the only measure of success in an engagement program. As we move from simple adherence to the more complex goal of engagement, qualitative goals and measures are just as important.

Program aspects like helping patients with cost issues, side effect management, encouraging them to discuss their treatment concerns with their doctor, providing dietary tips, empowering them to understand and participate in their healthcare and supporting them on their entire journey need to be considered.
PEOPLE & PROCESSES:

How do patients learn about your patient engagement programs?

The majority of respondents (68%) indicated that patients learned of their patient engagement programs from the HCP who provided program access, information and - in some cases - direct enrollment into the program. Over half of the respondents (58%) indicated that patients were directly promoted by the brand, 45% indicated they were referred by the HCP to the program website, and 23% indicated they were referred by the HCP to a program 800 number.

DISCUSSION:

Health Care Professionals continue to play an important role in building program awareness and enrollment. But with 58% of participants indicating that they are building program awareness through brand marketing activities directly aimed at patients, it’s clear that patient engagement is moving away from the traditional approach, where patients get enrolled as part of following their doctor’s orders and suggestions. Empowered patients are proactively searching for information on their condition, connecting with other patients on social media, sharing experiences, and researching drugs under development or in clinical trials. Marketing and brand teams can extend their reach and program participation by organizing marketing activities accordingly. Information gathered from these activities is also helpful in suggesting ways in which the programs can be made more accessible, relevant and customizable to the patients’ unique needs and preferences.
**Staffing, Interaction techniques, and Feedback Loop:**

Survey respondents completed a series of questions intended to determine the industry status on patient engagement programs, including whether HCP liaison staff are required in the program, whether motivational interviewing techniques or intrinsic coaching is employed, and if a feedback loop is included.

Figure 12: Are you currently or are you planning to use dedicated HCP liaison staff in your PE program?

![Survey Results Diagram]

- **48%** have no HCP liaison staff or plan to use them for engagement
  - 30% Yes
  - 22% Don’t know
- **52%** incorporate no motivational interviewing techniques or intrinsic coaching
  - 26% Yes
  - 22% Don’t know
- **48%** Don’t include a feedback loop
  - 39% Yes, AEs / side effects
  - 30% Yes, patient specific adherence information
  - 13% Yes, integrated w/ EMR

*Note: Percentages derived from multi-select survey question; responses will total greater than 100%

**Staffing:** Only 30% of the participants are currently or planning to use dedicated HCP liaison staff for their patient engagement program. 48% have no plan, and 22% responded that they simply didn’t know.

**DISCUSSION:**

Successful patient engagement programs are those that:

- Profile patients for potential barriers and seek the most relevant channels for engagement
- Support patients while on therapy with targeted interactions to ease their concerns and lighten the physical, social and emotional load that many treatments carry
- Utilize patients’ specific activities to motivate them to set and reach target goals
- Develop dynamic, multi-touch point protocols that incorporate iterative learning strategies to enhance program effectiveness.

By doing so, agents who are skilled, knowledgeable, and empathetic can build trust over the course of a patient’s journey, encourage and allow for two-way communications, and improve adherence rates and health outcomes.

Pharmaceutical companies should plan to add dedicated HCP liaisons, such as nurse coaches, to engage with patients and caregivers, or consider collaborating with a patient engagement partner with dedicated HCP staff who are experienced in delivering and managing such programs.
Interaction Techniques: When respondents were asked if they incorporate motivational interviewing techniques or intrinsic coaching, only 26% said yes. 52% are not using these techniques, and 22% simply didn’t know.

DISCUSSION:

By incorporating motivational interviewing techniques and intrinsic coaching during the patient engagement program, agents can:

- Express empathy for their patient and understanding of their condition and treatment
- Communicate respect for and acceptance of patients, their feelings and their decisions
- Establish a non-judgmental, non-confrontational collaborative relationship with patients
- Be supportive and knowledgeable
- Help patients become aware of any discrepancies between their goals and values and their current behavior in relation to program adherence
- Be open about their role to help the patient change and work hard to keep change on the agenda, but also respect at all times that the responsibility to change rests solely with the patient
- Avoid argument and confrontation, adjusting and responding to resistance but never opposing it
- Support self-efficacy and optimism by making reference to the patients previous achievements and strengths

Our experience has shown the described coaching techniques are effective. There are clear opportunities here for pharmaceutical companies to incorporate motivational interviewing techniques or intrinsic coaching in their patient engagement programs to achieve better patient outcomes.

Feedback Loop: When asked if their engagement programs included a feedback loop, 48% of respondents indicated that they did not include a feedback loop. Among those who included a feedback loop, 39% did so for AEs / side effects, 30% for patient specific adherence information, and 13% indicated that their feedback loop is integrated with EMR.

DISCUSSION:

Feedback to the HCP is an integral part of a patient engagement program. It is important to consider what type of feedback the HCP prefers. What is the preferred feedback method and frequency? Some doctors prefer to receive feedback about the patient’s progress in a very controlled and documented manner. Others are only concerned if an adverse event is indicated. When incorporating a feedback loop into a patient engagement program, patient privacy must also be considered.
TECHNOLOGY & REPORTING:

Adverse Events, Product Quality Complaints Recording:

Over 25% of the respondents stated that they frequently uncover adverse events or product quality complaints during patient engagements, 65% reporting it as an infrequent occurrence. 65% of the survey respondents stated that they have an intake process defined and are capturing cases in a system of record.

DISCUSSION:

It is critically important to record and document the discovery and management of AEs and PQCs. It has serious regulatory implications and can influence therapies.

It's important to remember that the number and nature of adverse events will vary based on the disease state and the nature of the call guide or script. If programs are very product focused and geared toward side effect management (e.g. oncology products, infusion products etc), more AEs can be expected. If the program is more disease focused or the indication is less acute, less symptomatic, then fewer AEs are to be expected.

What data sources do you incorporate into your reporting and analytics?

Survey respondents disclosed a variety of data sources they incorporate into program reporting and analytics. Patient and/or caregiver program surveys was the most selected answer (70%), followed by patient and/or caregiver interaction assessments (48%), system of record (35%), and digital health measurements (30%). Social media and online community groups are also mentioned.
DISCUSSION:

Reporting and analytics is essential for a successful patient engagement/adherence program. The data that is collected through interactions and responses enables pharmaceutical companies to track their patient programs and drive behavioral changes to improve adherence rates, outcomes and the overall health of patients under the care of an HCP.
CONCLUSION

This benchmarking survey was fueled by valuable insights from industry insiders. The results allow us to better understand the current state of the patient engagement landscape, while at the same time casting an eye to the future. In reviewing the survey results in total and subsequent interviews with our subject matter experts, we are suggesting the following key takeaways:

**Fully Understand Your Patient Community**

Effective data collection and reporting is an essential ingredient for a successful patient engagement program. In addition to patient demographic data, things such as side effect profiles derived during clinical trial phases should be considered and applied to the development of engagement programs. Further analysis of patient data, such as socio-geographic data, behavioral information, and prescription fill information, can help to forecast medication adherence, and direct the deployment of more personalized engagement programs leading to better patient outcomes.

**Support and Educate Your Patients**

Staff your patient engagement teams with HCP liaisons, such as nurse coaches, who are skilled, thoroughly trained, and empathetic to the patient’s journey. Utilize motivational interviewing techniques, intrinsic coaching and problem solving to address patient concerns, instill them with confidence and truly empower them to participate in the management of their care.

**Optimize Communication Channels Based on Patient Profiles and Preferences**

Don’t lose sight of the basics when it comes to defining and implementing an effective and patient-friendly engagement program. Disease state and patient needs dictate the most effective channels of communication and frequency of use. One-to-one coaching should be utilized for those patients most in need as determined by their disease state and treatment regimen. Effective program surveillance and feedback will help to ensure that patients receive the best possible outcomes.

**Employ an Effective Patient Engagement Technology Platform**

Make best use of the available technology to support your patient engagement programs. Program technology should provide a comprehensive view of the patient's interaction history, empowering the agent with all of the information necessary to have a natural conversation with the patient. Look for a fully validated case management solution which can provide interaction queues, intelligent workflows that anticipate patient needs and easily ensure appropriate follow-ups. Good documentation practices will drive compliance and help to achieve consistently better program results over time.

**Embrace Regulation**

Effective patient engagement programs recognize that regulation and compliance are part of the program fabric. However, this is as much an opportunity as challenge. Build your program based on industry best practices – many of which have been identified in this report. Utilize in-house or vendor partner teams that share your commitment to recruiting and training a professional staff that are supported with the appropriate program delivery technologies and documentation routines. Proactively managing compliance through program design and staffing will help to build in regulatory confidence. For example, overcoming concerns about the detection and documentation of AEs during patient engagement.
C3i Solutions conducted and provided this survey report as a tool to better understand the current patient engagement landscape. What are the shared challenges and concerns? How are they influencing our strategies and the use of our people, processes and technologies to address them?

We hope you have found the report helpful in addressing those questions and offering a few insights about how they might be answered by your organization.

To learn more about C3i Solutions and our global patient engagement services, please visit www.c3isolutions.com.