Patient Journey - never heard of it? Well, you will be hearing a lot about it in the next several years. Not only are most pharma companies getting involved in Patient Journeys, but hospitals, patient associations, and even governments are trying to get closer to the patient. Why is everyone doing this, and should I care? Simple - everyone involved in healthcare (governments, healthboards, patient associations, the pharmaceutical industry) have realized that patients are the true customers, and are ultimately at the center of the system. Governments, like industry and other associations, have started to recognize that, if we don’t get close to the ultimate customer and understand the system the way they see it, then we cannot deliver the services and products they want. By failing to see the system through the eyes of the customer, we fail to understand why they stop taking a product, and in certain instances, move to non-traditional therapies that are not only more expensive, but in some cases, are scientifically proven to harm them. With the notion of “do no harm”, we, as part of the healthcare system, need to understand the patient’s mindset better if we want to grow our products in the most effective and sustainable way possible.

We have all been told that medicine is “a science of uncertainty and an art of probability”. For most of us who have grown up in the industry, the same can be said of marketing and sales, particularly when it comes to developing the foundation of the brand strategy and executing on it. We live in an environment where clinical data and its outcomes drive decisions of product usage, and it is based “mostly” on the evidence at hand. The reliance on hard outcome-evidence is what truly differentiates marketing and selling of pharmaceutical products from the promotion of other products, such as frozen peas at your local grocery store, or shoes at

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**What is it?**

- A Patient Journey captures all phases of a patient’s experience from onset of the disease throughout their life – regardless of cause of death

**Why build it?**

- Answer the questions of ‘what’, ‘where’, ‘whom’ and ‘how much’
- Identify levers for brand introduction or growth

**What does it provide?**

- The patient’s perspective – the ultimate customer
- An eye-opening to understanding of bottlenecks, time delays, and duplicate efforts that you, as a company, can impact

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**FIGURE 1: THE PATIENT JOURNEY IS A POWERFUL TOOL FOR UNDERSTANDING THE MARKET AND DESIGNING WINNING STRATEGIES THAT WILL GENERATE SUSTAINABLE PATIENT CENTRIC REVENUE**
the local mall. The biggest problem with our reliance on data is that it is often seen as cold, statistical, and fact-based; in essence, we all think scientifically. Unfortunately, the patients rarely think this way. They tend to think emotionally; after all, it is their life we are talking about, not a p value (see Figure 2). Understanding this gap in communication from the perspective of the patient is at the core of a Patient Journey. A Patient Journey is a powerful tool for understanding the market, helping you design winning and sustainable brand strategies, and executing on this strategy (see Figure 1).

**Importance of the Patient Journey**

A Patient Journey, in its simplest format, is designed to understand how patients experience a disease or condition from their first awareness of symptoms through all stages of presentation, diagnosis, referral and treatment, fulfillment and adherence; finally culminating in a cure, remission, control, or death. Although the value of seeing the treatment process through the eyes of the customer has been understood in the consumer world, it is new to healthcare. We have begun to see that, to fully understand the Patient Journey, we must leverage both primary qualitative market research and quantitative secondary data; simply relying on one data set will often, if not always, limit the insights by 50%.

**Evolutions of the Patient Journey**

How and why did the Patient Journey evolve to where it is today? For many years, companies tried to build their Patient Journeys on data collected via primary research alone. These studies typically consisted of interviews with a few dozen physicians, followed by a 20-minute quantitative survey with 100-150 physicians. The problem with relying only on this approach is that it introduces inherent shortcomings that limit usefulness of the information. The shortcomings of this approach are based around the lack of “true” quantitative data, as all of the key insights are developed from perceptual insights. At no time did this methodology allow for the leveraging of robust longitudinal data used. This resulted in the key insights being “direction in nature” only, and the full value of the Patient Journey was lost. To overcome these shortcomings, many companies began to move exclusively to secondary data. This approach was undertaken to fully dollarize the gaps that were occurring within the patient flow, and to highlight where in the process the largest opportunity appeared. Once again, inherent shortcomings in this approach introduced other methodological biases. Companies and other organizations were able to see what was going on, but were now unable to explain why things were happening. The frustration that resulted in the shortcomings of these two independent methods indicated that something needed to change, and a new approach in Patient Journeys was developed.
A New Journey of Discovery: Linking Primary Market Research with Secondary Data Within a Patient Journey

Once researchers became aware of gaps that each approach had, they quickly realized that the best solution would be to link both primary and secondary data in a Patient Journey. By integrating both data sets, brand teams, companies, and other governmental organizations could finally understand the feelings of the patients, and then quantify how a change in behavior can positively impact an outcome, both at the patient level and the overall healthcare system (see Figure 3). Understanding this process has become critical, as governments have begun to realize that the most expensive patient is the non-compliant one. Governments are realizing that to pay for 12-18 months of medication, while getting none of the benefits, is just not cost-effective.

With the full understanding of the pros and cons of building a Patient Journey, research has learned that a properly-run Patient Journey is the cornerstone to a solid patient-centric strategy that can drive revenue, while controlling costs. It really doesn’t matter when, in your brand’s lifecycle you start the Journey, it just matters that you start one.

Using the Patient Journey Effectively

While having a comprehensive Patient Journey in-hand is essential to creating an effective brand strategy, a Patient Journey alone is no guarantee of success. Companies and brand teams must translate the insights from the brand plan into strategies and tactics that are implemented and measured. Most pharma companies do a very good job of identifying behavioral objectives in the Patient Journey and prioritizing them; however, when it comes to laying out action plans behind these behavioral objectives, we have seen several brand teams struggle, and the true value of the Patient Journey fails. At times, brand teams tend to look at each data-set in isolation, and the process of holding a 1-2 day off-site meeting, designed to gain the insights, is skipped. This failure to imbed the learnings into the company/brand team culture is the #1 reason for failure. Aligning the behavioral objectives with the secondary trackable data is the foundation to winning in the marketplace and should not be skipped.

To fully leverage the insights gained from a Patient Journey, brand teams should follow the steps outlined below. Once the primary and secondary data has been collected, reviewed and understood, you should ensure that:

1. Leverage points, critical to the brand’s success, have been identified and defined; e.g., patient adherence.
2. Tactics, and the process of implementing them, have been clearly defined and can be measured; e.g., co-programs with hospitals and health systems.
3. Clear and defined performance tracking metrics with timelines in place, including defining the targets; e.g., ensuring that 80% of patients stay on therapy after 3 months, as seen in longitudinal patient-level data.
4. Communication of the benchmarks are well understood; e.g., looking at persistence curves on a monthly basis

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<thead>
<tr>
<th>Issues in Building</th>
<th>The IMS Brogan Approach</th>
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<tbody>
<tr>
<td>Patient perspective is ignored</td>
<td>• Understand the patient perspective through the entire Journey</td>
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<tr>
<td>Based on physicians’ perceptions and not reality</td>
<td>• Use multiple projective techniques for ‘whys’</td>
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<tr>
<td>Important dynamics are often missing</td>
<td>• Leverage primary data to build a realistic, comprehensive view of the market and use secondary to quantify</td>
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<tr>
<td>‘Whys’ and evolution not well understood</td>
<td>• Incorporate granular dynamics, using a rich combination of primary and secondary longitudinal patient level data</td>
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<td></td>
<td>• Therapeutic and functional experts ensure comprehensiveness</td>
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<td></td>
<td>• Use projective techniques to understand deep drivers of physician and patient behavior</td>
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<td></td>
<td>• Discuss the future of the therapy area with physicians</td>
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FIGURE 3: THE APPROACH AND EXPERIENCE IMS BROGAN USES IS DESIGNED TO OVERCOME MANY OF THE ISSUES TYPICALLY ENCOUNTERED WHEN BUILDING A PATIENT JOURNEY
5. Performance mitigation plans are in place to ensure that, if results are not tracking to expected outcomes, key actions can be initiated before it’s too late; e.g. if persistence is below 70% after 3 months, initiate an internal market research study to understand if the right patients are actually being put on the drug, or if the sales reps are just asking for any patient, resulting in a misaligned strategy.

Conclusion

Patient Journeys can provide a brand or company with the greatest insights into driving patient-centric revenue. Understanding how to do this will be critical in the post “MEGA-brand era” we now live in. A well-designed and thoroughly researched Patient Journey will not only provide you with a basic foundation for a brand strategy, it will also provide insights that can re-shape the discussion you are having with drug plan payers on what is the right patient and right outcome (see Figure 4). Only by combining patient-level data with in-depth qualitative surveys can pharmaceutical marketers fully understand how and why different patients are likely to progress through the treatment of a particular condition. Remember, if you don’t believe this is important, just think; the Manitoba government just announced a $40 million dollar Patient Journey initiative to focus on shortening the entire Patient Journey within cancer services. If it doesn’t sound important, then ask yourself: How many companies in Canada sell $40 million dollars worth of product in Manitoba…?

So, do you think Patient Journeys are important now?

Contact your local IMS Brogan account team to find out more information.