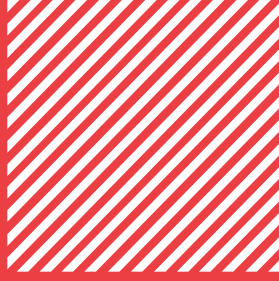


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Patient-Centric Marketing

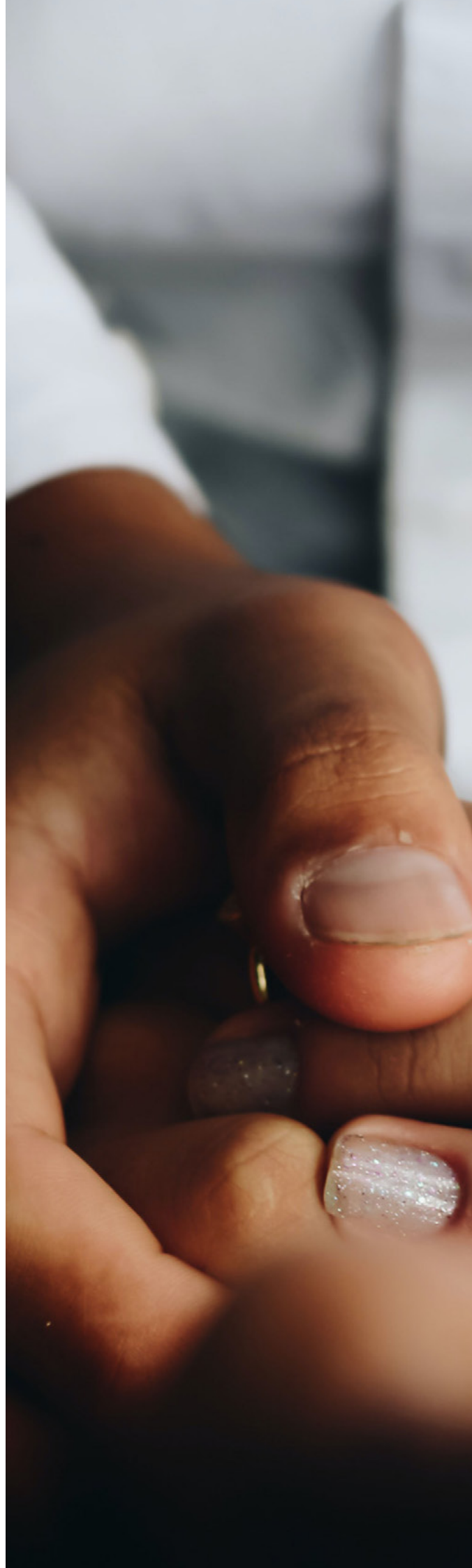
Leveraging empathy and data to improve care



Today, brands across the healthcare industry are striving to become more patient-centric, engaging the patient directly to understand their needs and eliminating friction along their journey to deliver better care.

With so many patients shifting their care journey online and the subsequent potential to tap into data that can improve care, the opportunity to be patient-centric has never been greater. In Asia Pacific, nearly 50% of patients said that they expect to use digital health tools in the next five years. And 91% of consumers said they would use digital health services if the costs were covered by an employer or insurance provider.¹

¹ COVID-19 Accelerates The Adoption of Telemedicine in Asia-Pacific Countries, 2020, Bain & Co





As a result, more digital disruptors are succeeding in healthcare, better service experiences are on offer, and patient expectations of healthcare are on the rise. For example, the number of new users on Ping An Good Doctor, a Chinese healthcare services platform, rose nearly 900% in January 2020.² Telehealth platform Halodoc in Indonesia saw a 101% increase in active users early in 2020. MyDoc in Singapore reported a 272% increase in users from 2019 to 2021.³

Patient-centric digital engagement can improve many aspects of the brand experience, from more efficient clinical trials to speedier appointment bookings. But what about marketing? What should the role of communications be in contributing to better patient outcomes? If we are serious about patient centricity, taking into consideration compliance requirements of course, then our marketing communications should also improve the care journey.

If your brand offers direct patient services, this is probably something you are already thinking about. But many healthcare brands, for instance pharma, nutrition, and technology brands, are very restrictive in their communications with patients due to regulations, and often rely on conversion through healthcare professionals rather than direct patient and consumer relationships. In this case brands are perhaps under-estimating the potential impact of marketing to consumers.

² COVID-19 Accelerates The Adoption of Telemedicine in Asia-Pacific Countries, 2020, Bain & Co

³ <https://www.asiapacific.ca/publication/10-things-asia-watch-2022>



“Marketing has a huge role to play in delivering truly patient-centric outcomes,”
says Pierre Robinet, President of Ogilvy Health, Asia. *“And it starts by redefining the
engagement strategy with all stakeholders contributing to the care journey, starting
with the patient and looking beyond the healthcare professional”.*

For instance, consider the power of personalization. By collecting patient data in a relationship of transparency, trust, and mutual value, engaging with patients online can lead to a better understanding of their needs. We can get to know patients better and offer them the information and next steps that best serve their well-being.

The reality is that with so many patients seeking information online, and thus generating a vast amount of personal data, every healthcare brand must reconsider themselves as a direct-to-patient marketer. Every brand with health expertise can have a role in sharing valuable information and helping patients achieve better care.

The choice is not either marketing to patients or healthcare professionals. Technology and data will help reconcile patient needs with any marketing and sales activities to healthcare professionals and naturally improve marketing efficacy. Health marketing need not be unilateral and can embrace multiple stakeholders’ strategies simultaneously.

When done right, patient-centric marketing communications can increase access to care for more consumers and patients, address the right physicians at the right time with what matters to their patient, and empower your sales force with patient insights.

“It is more possible than you think to be patient-centric, you can operationalize that empathy, and bring it to life with technology,” says Waheed Bidiwale, Chief Strategy Officer at Verticurl.

In Southeast Asia, the stakes are particularly high. With insufficient healthcare professionals and healthcare infrastructure, many Southeast Asian nations struggle to provide the desired level of support.⁴

New digital services such as tele-medicine and patient reported outcome platforms undoubtedly offer new promising solutions for increasing access to care and should be considered in any marketing strategies. But only in a context of customised local knowledge, empowered communities, and empathetic care, to ensure patients are at the core of the thinking.

“New healthcare digital experiences should be designed with empathy to serve the patients. This results in leveraging digital communities, designing services meeting patient needs, and delivering personal and unique experiences for each individual,” says Robinet.

⁴ Health workforce requirements for universal health coverage and the Sustainable Development Goals – Background paper N.1 to the WHO Global Strategy on Human Resources for Health: Workforce 2030. Human Resources for Health Observer Series No 17. World Health Organization, 2016.

Below is a guide to activating patient-centric marketing for healthcare brands.

1. Listen

Understand Patient Needs and Define Your Value

What is your role in the evolving patient journey? How are you going to partner with patients to create value on both sides? Before investing in digital engagement, brands should step back and take the time to get to know their patients. The goal is to identify gaps in their journey where there is an opportunity to provide value, and in so doing also drive your business objectives. According to Sathya Krishnan, Healthcare Consulting Director at Ogilvy, *“Even if you think you know the needs of your patients, think again.”*

“Since the pandemic, all the things we knew about people have changed, behaviours and attitudes have changed. We need to go back to the drawing board and understand who they are right now, capture those moments that are clear opportunities to leverage,” says Krishnan.

The solution is to take a behavioural science approach and track their experience step by step searching for friction and unmet needs, defining the right solutions to nudge them along this journey, helping them to act and drive adoption.

“When we map out the entire user journey and trace the opportunities for programs or partnerships, clients are stunned with the things they can do,” says Krishnan.



For example, we know that patients are the best source of information about their sensations, emotions, and social functioning.⁵ Those who engage and contribute to their own care continue treatment longer, leading to improved quality of life and lower rates of hospitalisation.⁶ Achieving that requires self-reporting tools. *“To promote high user adoption, platforms should apply a user-centric design that uses visual elements and real-life data,”* says Shaun Graydon, Product Marketing Manager at Varian, a Siemens Healthineers company.

Mapping the patient journey is about more than the patient. Often, people in the support network are key decision makers and you will need to understand their needs as well. It is important that in the research process you cover not just patients but also the network of loved ones and healthcare professionals involved in their journey.

A vision for your expanded role in the patient journey should point you to new metrics and ways of measuring success beyond sales or doctor visits. It is important that the link between improving patient care and business outcomes is clear so that you have identified meaningful metrics to track down the line when you begin to activate.

⁵ Clinical Oncology Society of Australia 2018, Implementing monitoring of patient-reported outcomes into cancer care in Australia. A COSA Think Tank. Accessed 21 Mar. 22, https://www.cosa.org.au/media/332504/cosa_pros_think_tank_report_final.pdf

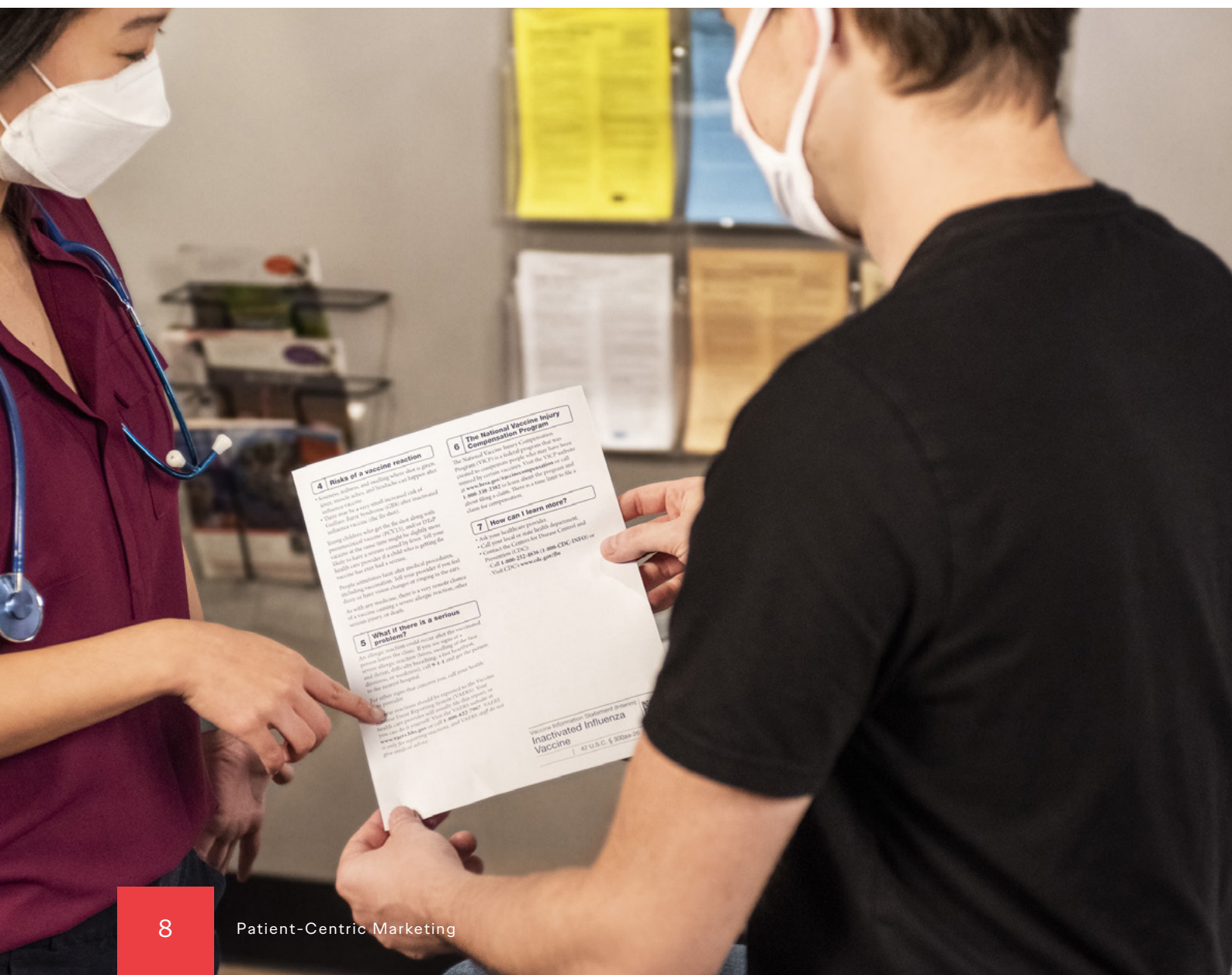
⁶ Basch E, Deal AM, et al. Symptom Monitoring with Patient-Reported Outcomes During Routine Cancer Treatment: A Randomized Controlled Trial. *J Clin Oncol*, 2016 Feb 20;34(6):557-65. doi: 10.1200/JCO.2015.63.0830

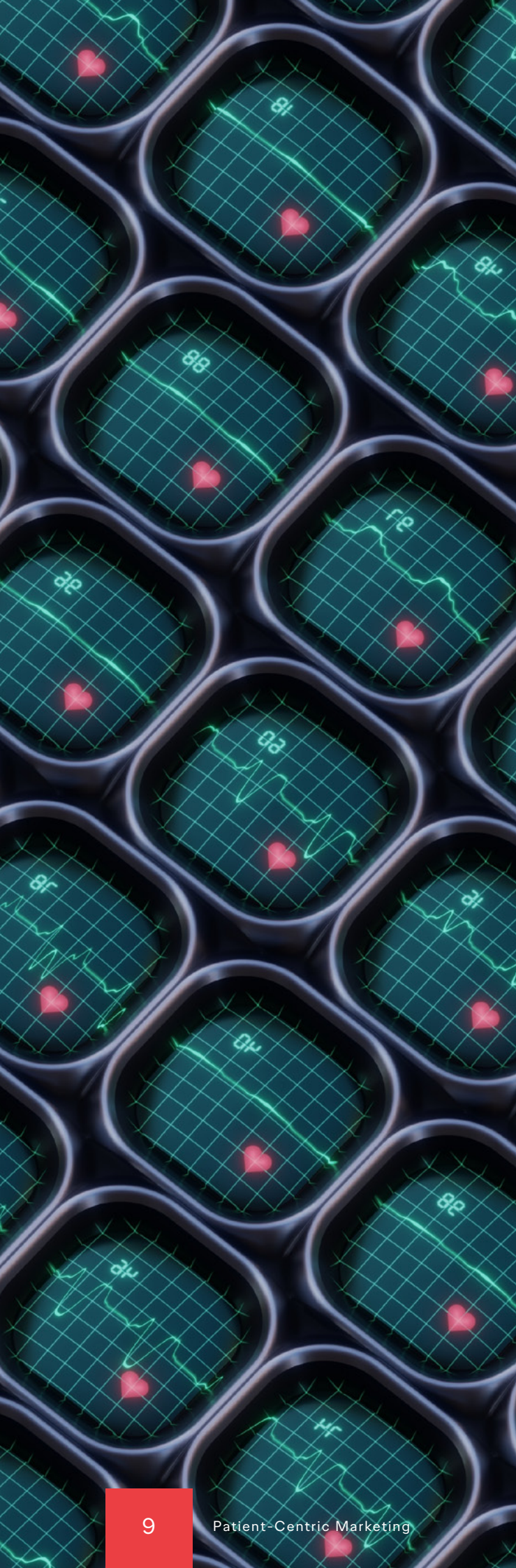
“You might not be able to directly sell products to patients, but you can become a trusted expert they turn to for information on their therapeutic area,” says Bidiwale.

“The call to action is still ultimately to ask your doctor, but there is a lot more you can do to influence patient education and create an interest in the healthcare solution and the products you are developing to improve their lives.”

The role of trusted expert is an important one for healthcare brands, and there are many ways to build upon it.

At the same time, brands should map against those journeys how technology and data might be leveraged along the way. The role of data in the patient experience is crucial to deliver patient-centric outcomes, and a culture of dynamic and data powered patient journeys should be the new norm.





2. Share

Improve Access to Valuable Information

Once you understand patient needs, the next step is to share valuable information on your existing touchpoints as a starting point. Many patients begin their care journey with online research. Regardless of age range, over 80% of consumers say they research every diagnosis online.⁷ As a healthcare brand, one of your greatest assets for patients is your wealth of expert knowledge. Earning a greater role in their journey begins with making it a more worthwhile and helpful learning experience wherever they find you online.

⁷ The Consumerization of Healthcare, 2019, Adobe

“Let’s say you are relying on patients to do self-study before they even reach out to a doctor,” says Bidiwale. *“You need to make sure they can get all the best information on your site, instead of elsewhere. Brand websites need to be rich enough, address key challenges in simple language, and offer solutions.”*



Patients are increasingly deciding the course of their healthcare journey independently, so providing them with the right information to make better choices can have great impact, according to Peter Williams, Healthcare Advisor APAC at Oracle.

“From the patient point of view, the use case is very simple: it’s all about navigating the health system,” says Williams. *“It can be a nightmare finding information that is reliable and trustworthy. The logical thing is to build relationships and loyalty, convince people you are a trusted source of information.”*

Consider cancer care. Educational information is often delivered during the first consultation, but patients may need to access further information on their own through a cloud-based portal, which can be reviewed and processed when it is best for the patient.

If you have been reluctant to engage with patients directly in the past, this will be a great exercise in figuring out your tone of voice, eliminating jargon and communicating in a heartfelt way that will work online and on social media.

But if your sales are not tied directly to patient engagement, what is the benefit to your business?

Your top objective should be to better understand patient needs so that you can optimize and better serve them. By engaging more patients online, you are creating a community of users that you can learn from. What do they respond to? How do their needs differ across segments? Sharing information with patients not only makes them informed partners in care but allows you to learn by observing their behaviour. It is possible to marry the data with certain patterns and generate useful segments just based on these interactions.

“We can learn about who is engaging and start building AI and machine learning analysis based on that model,” says Bidiwale. *“We can see what resonates with what audience type and optimize based on what drives their choices.”*

For instance, social listening is one way to extract key insights on how consumers behave and react to a specific situation. One example is when a pharmaceutical brand uses social listening tools to understand the hesitations faced by parents when it comes to vaccination decisions for their children. There could be some parents who are optimistic or have the optimism bias and believe their child can never contract the disease under any circumstances; there could be parents who are highly influenced by how other parents behave. Through this process, it becomes easier to engage parents with the right message and reinforce the patient perception of information from trustworthy sources.



“Screening health social media and online behaviors and leveraging technology to detect sentiments, interest, and behaviour bias can help brands to take part in influential online conversations, join communities of care givers, and tackle misinformation,” says Robinet.

It is important to begin keeping track of patient behaviour as they explore your online channels, so you can increase your insights about patient needs through their interactions with you.

Of course, transparency and trust always come first. Patients are increasingly comfortable sharing their data if they believe in the value they will receive in return. Figuring out how to balance information gathering with privacy concerns in a way that patients embrace is critical to patient-centric marketing.

The technological capability to process user data efficiently is enabled by cloud computing. Brands require a system to collect, sort, analyze and attribute data to a single-patient view, as well as share out consistent information to your entire team. This system is called a Customer Data Platform, or CDP, and it is becoming essential.





“It is likely that you already have data sitting around through your existing interactions with patients and physicians,” says Bidiwale. “But how do you bring it all together in a compliant way, respecting patient’s data privacy? A CDP is the basic building block, the start of the journey. Once you have the data, then you can decide how to optimize, isolating the data you will use for commercial and marketing purposes in a compliant way, and do more.”

A CDP will allow you to personalize direct communications such as emails and ensure the right content is going to the right stakeholders. With the complex network of stakeholders involved in patient care, it is important to be able to recognize and customize responses accordingly. You can reinforce the value of what that specific audience needs, send out targeted information related to care, learn what the customer pain points are, and what to do about it. There is evidence that personalized communications post discharge from the hospital can even reduce chances of high-cost follow-up care for patients.⁸

⁸ <https://www.mckinsey.com/industries/healthcare-systems-and-services/our-insights/the-role-of-personalization-in-the-care-journey-an-example-of-patient-engagement-to-reduce-readmissions>

To an extent, brands will need to have a CDP simply to deal with the deluge of data that patients and physicians will generate as more of their care journey goes online. The potential volume of data from things like mobile devices and IoT can smother the important details.

“What information is important to me as a patient? How long is that important for?” says Williams. *“Does my broken arm from two years ago matter to my diagnostics now?”* *Healthcare brands need systems to organize and sort data not to get lost.”*

Beyond sharing data with patients, a CDP is important for sharing data internally with your team. With a cloud-based platform, every member of your marketing and sales teams will have access to the most up-to-date information at all times.

The benefit of doing so goes beyond fostering a greater role for your communications with patients. The data you collect and analyze can provide valuable insights that could be useful in other areas of your business, even as far as helping to drive new therapies.

Finally, such cloud-based services and CDP will help reconcile all marketing activities towards the multiple stakeholders that matter along this care journey.

Brand messaging needs to target at least two audiences – patients and their healthcare professionals. Patients need general information about the benefits of products and the evidence to support that. Healthcare professionals need clinical information to determine the applicability of a product for the patient. Beyond these two audiences, brands should consider the supporters and caregivers who also contribute to care.



How do we make sure all the information we share to various audiences contributes to a consistent and reliable brand recommendation to patients?

As Gregg Bolach, Managing Director of Caretech Services put it, *“The risk is in patients making decisions purely on marketing information they receive from sources they trust, but due to incomplete information, getting inadvertently misled.”*

This is also an issue where compliance comes into play. Different life sciences brands have different allowances in how they communicate to patients.

It is thus critical to have a system to monitor, measure, and integrate information from all points of connection with patients and their support team to make sure our communications are as informed and consistent as they can be. This system must treat marketing and clinical information separately, and marketers must be sensitive to this divide.

By implementing a single view of customers and patients, life science leaders will be able to measure the efficacy of their marketing activity towards different audiences, and capture the value generated to their business. They can even bridge the gap between communications and what happens in the consultation room. There are now service providers that can help extract relevant data from EMR (Electronic Medical Records) allowing healthcare giants to measure the results when patients are meeting their physicians, and factor that into their overall analysis.

The future of health marketing relies on the ability to implement a single and unified view of the entire journey.

“Such technology will rapidly help create a unified view of the customer journey and help implement a data model to help balance the investment in any single marketing and commercial activities to engage with all stakeholders, whether they are patients, caregivers or physicians,” says Robinet.

3. Serve

Create or Partner with New Tools that Improve Care Outcomes

An analysis of the patient care experience is sure to reveal many potential partners with a role in their journey, from new telehealth platforms that patients are consulting to smart watches with the ability to collect potentially life-saving diagnostic data.

With a strong human understanding of your patients and a technology foundation to collect and analyze their data, you can consider where to innovate and offer new services that improve care outcomes.

“For instance, if patients are going to the hospital two or three times a week, hospitals can deliver services as simple as taxi pickups,” says Robinet. *“That kind of additional service supports mental health and, when it comes to customer satisfaction, is highly valued.”*

Patients also value the ongoing clinical support that cloud-based platforms can provide. *“When patients have questions out of clinic hours,”* Graydon says, *“algorithm-based rules automate responses, either reassuring the patient or directing them to their nearest hospital. The care team can then follow-up in a timely manner. It’s about making sure patients feel secure and reassured.”*



Even brands that do not have patient services at the center of their business model can get marketing benefits from launching services that strengthen your role as a partner and driving increased loyalty. Take for example the potential for partnership between pharmaceutical brands and telemedicine providers. From sponsorship of a disease education campaign on a telemedicine provider's owned channels to increasing accessibility through medical consultations within the telemedicine providers' doctor networks, pharma is becoming more involved and connected across the digital journey of the patient.

"We have started seeing more strategic partnerships between pharma and telemedicine players in the region," says Krishnan. "There is the right alignment of objectives across pharma and telemedicine players that believe partnership will continue to build brand loyalty with their target audience."



Launching this kind of initiative certainly comes with risks. There are always legal, compliance, and regulatory barriers internally and externally to figure out and perhaps dissuade brands from investing in large-scale projects.

The solution is incremental innovation and agile sprints. Start small, experiment, learn, and improve over time. If investing in an umbrella project with a new partner feels too uncertain, you can test the working model first and adapt how you collaborate as you scale up.

For example, a simple and valued digital service would be to support time pressured physicians in Asia to drive better communication and consultations with patients. Ogilvy worked with a pharma company in the region to design a diabetes digital solution that will enable the physician to understand key barriers for patients. By creating a simple but engaging behavioral questionnaire with local and cultural nuances in mind, patients were able to share about their hesitations on insulin initiation.

Starting small innovation exercises can eventually lead to big outcomes well beyond the usual marketing metrics. The ultimate goal is to improve access to healthcare, improve the quality of healthcare, and improve patient lives.

“Near term, it’s about figuring out how to make better use of what you have to serve the patient better,” says Bidiwale. *“Longer term it’s about how we can make healthcare more effective and cheaper. Digital has enabled that transformation elsewhere, and there is no reason why it can’t happen in healthcare.”*

Conclusion

There are great reasons to advocate for patient-centric marketing, even though successful operationalisation will take some work.

The logistics involved can be complex. Operationalizing patient centricity can and should involve cross-functional collaboration, and that can make it tricky to decide who will be the project owner responsible for the budget and championing programs within your organization. There is also the worry that trying something new could lead to mistakes that potentially hurt your reputation in the market.

We believe that building your patient-centric technology capabilities and operational processes now will protect you in the future as the marketing landscape continues to change. Without the ability to directly engage patients and provide valued outcomes, healthcare brands will be increasingly disadvantaged as marketing strategies of the past cease to work.

Ultimately though, patient centricity should be about what is best for patients. Patients are operating more independently and need brands they can trust. Brands need to empathize and understand patient needs with authenticity before gaining patients trust. With regular communications, both parties will naturally be empowered with more information, encouraging collaborative and effective change.

If you are truly committed to improving and saving patient lives, then the potential benefits of patient-centric marketing are simply too great to ignore.

We hope you've found this paper of value.

Marketing has a huge role to play in delivering truly patient-centric outcomes. We can help you create effective engagement strategies.

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