

Customer Experience and the Patient Journey

A DHC Group Project

INTRODUCTION: Why Does Patient Experience Matter?

Pharmaceutical and life sciences companies have an opportunity and obligation to enhance the treatment experience—the part of the patient journey associated with starting and staying on therapy. Manufacturers are in a unique position to strengthen the connection points between patients, caregivers, advocacy groups, providers, payers and others involved in the treatment experience. An integrated treatment experience, driven by effective collaboration across these stakeholders, can make all the difference when it comes to patient outcomes. (excerpt from [Reinventing Patient Centricity](#), from ZS Associates).

The following POV explores how individual stakeholders within pharma companies can impact the patient experience. Many of the insights that follow are derived from the recent DHC Summit, hosted by Genentech and the DHC Group, as well as additional consumer-level data points provided by Healthline Media that provide important context of audience behavior and attitudes. This collaboration of CX thought leaders from across the industry has resulted in four key themes which will be explored here:

01
Rethink The Patient Journey – How Patient-Centricity Truly Looks



02
Collaboration is Key - Inside and Outside of the Organization

03
The Message Matters - And So Does Method of Delivery



04
Learn from the Data - And then Adapt

01 Rethink The Patient Journey – How Patient-Centricity Truly Looks

Pharma companies and individual marketers have long claimed to be “patient centric”, so step one on the path of rethinking the patient journey is to take an honest and unvarnished look at how patient centered the status quo really is. Not surprisingly, leaders in pharma CX note that while some efforts and policies might be patient friendly, few are truly patient centered. CX thought leader Laurie Meyers shared her commitment to remain hyper-focused on patient centricity with Summit attendees.



We started to look across our organization and say, ‘what are the key things we need to do in order to move from patient-friendly to patient-centric?’ In some places we were already a little bit more focused, so we tried to learn there, but across the board one key area that we focused on this year has been rethinking our patient journeys.

Laurie Meyers, Executive Director Patient/Customer Engagement and Experience Design, Genentech

Rich Schwartz, (Life Sciences Industry CX Practice Lead, Medallia) holds the belief that one of the ways pharma achieves patient-centric thinking is by layering compassion on to an already existing empathetic patient view. In his work, Rich has uncovered that customers will trust brands and advocate for the brand when they feel listened to, cared for, and shown compassion at some point. Beyond empathy (attempting to understand patient pain points), compassion seeks to offer help (working to relieve patient pain points). In Rich’s words “compassion is empathy’s more athletic cousin.” Operating from a place of compassion means acting on feedback and sharing those actions and is an essential step toward true patient-centricity. Relentless resolution helps marketers get more accurate feedback from patients on what they are doing right or wrong.

Q: How Do People Living With a Health Condition Feel About Pharma Companies?

A range of research sources show the importance for pharma companies to have a focus on patient centricity.



The Pandemic Impact:

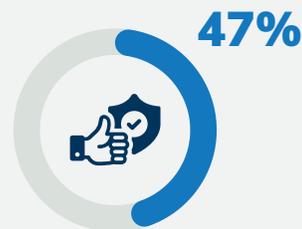
A qualitative study by Healthline Media during the pandemic found that many people living with conditions did not feel supported. They had concerns about the supply chain, high prices, interactions with the COVID-19 vaccine, and wanted pharma companies to anticipate their needs. The pandemic shed light on issues that need to be addressed to better support medical needs.



Level of Trust:



According to the 2022 MARS Consumer Health Study, only 35% of people living with a health condition trust the pharmaceutical company(ies) of the medications they take.



Healthline Media found similar insights, with only half (47%) of respondents diagnosed with a condition finding brands and pharma company websites to be trustworthy.

As the patient journey is re-evaluated, it is critical for pharma to better understand when and where trust is gained, or potentially lost, and how to effectively address it.

Collaboration is Key - Inside and Outside of the Organization



To be a compassionate industry, the people within it must be emotionally mature and willing to be vulnerable. This can be difficult, but it is important to provide the best care possible for patients. And I think the more we can bring who we are as compassionate people to work, the more the industry starts to look and feel and be the compassionate industry we know we have to be.

Erica Taylor, Vice President, Chief Marketing Officer, Genentech

With commitment towards patient-centered compassion in place, organizations will need to make structural changes to how they work and empower decision makers, both inside and outside the organizations. It is clear from the insights of CX leaders that the structure of most current pharma orgs is a roadblock to true CX success, especially as it relates to patient journeys.

COLLABORATION INSIDE THE ORGANIZATION

"The other thing that we knew that we needed to do as we thought about patient journeys was to think about having multiple teams involved. We knew that we also needed to think about bringing in cross-functional teams." As explained by Laurie Meyers (Genentech), decision makers must take a step back and consider the patients in all of their activities. Marketers must ensure that patients are offered seamless, consistent, and meaningful experiences because that's what patients want. Achieving that means thinking about humans, and the lived human experience.

In fact, people living with a health condition want health and wellness brands to seek to understand their experiences. What are their top priorities? A Healthline Media study uncovered that they want brands to make affordability (62%), ease of use (51%), and be motivated to improve the lives of people living with health conditions beyond making a profit (51%).

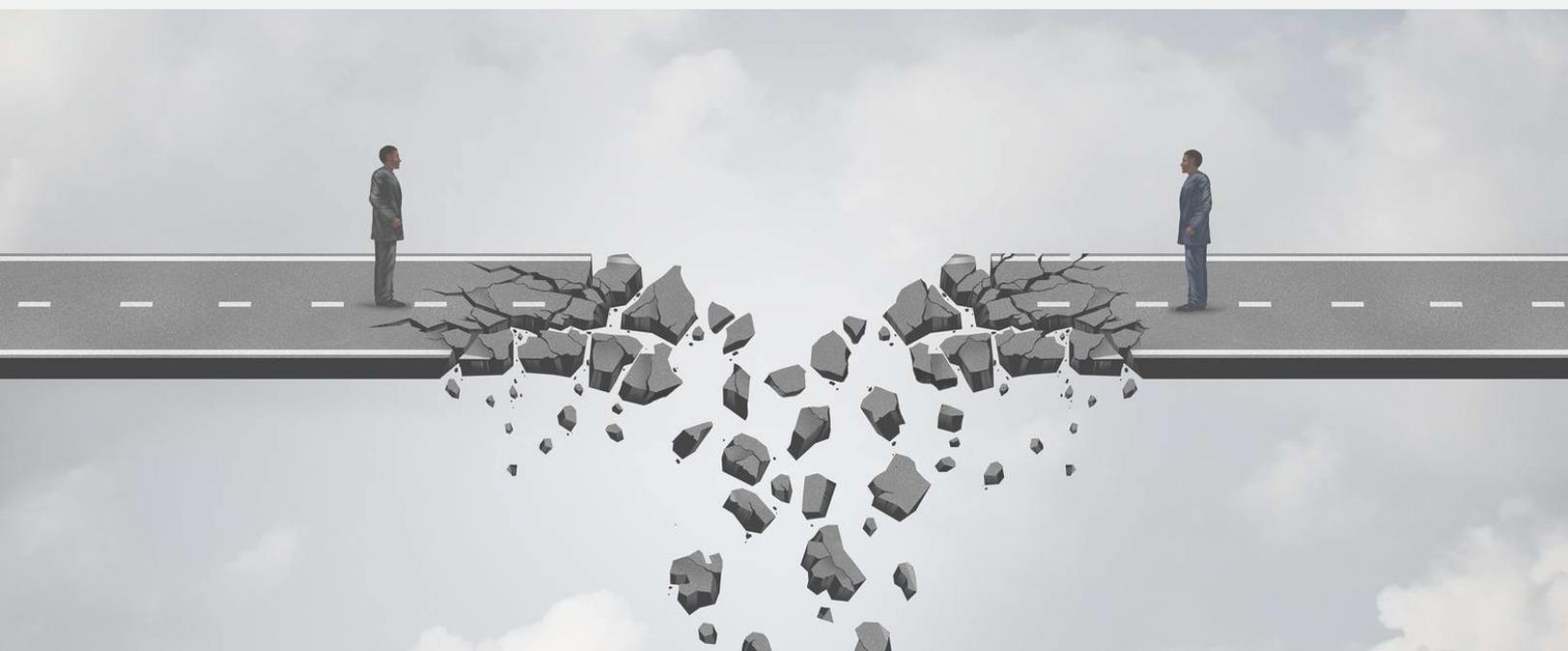
Anchoring customer journeys at the organizational level is crucial to achieving patient-centricity because it allows organizations and teams to include everyone in the conversation. Everyone along the continuum will feel the impact that they can individually and collectively have on the customer. In doing so, organizations can concentrate efforts on the pain spots throughout the customer journey.

It is important to acknowledge that making structural changes within organizations will be a battle and learning from the failures is key. One such early failure described by Genentech's Alex Cook, Senior Director, CMG Strategy and Insights - assuming that they knew the customer pain points before taking the time to listen.

“We were presenting customers and patients with solutions we thought they needed rather than designing and implementing solutions they were telling us they needed. - Alex Cook. “We weren't talking the same language. We weren't prioritizing, we weren't solving together, and it was a disjointed experience for our customers.”



Alex Cook
Senior Director,
CMG Strategy and Insights



Organizations will need to do more than introduce a new tool or tweak an existing tool. The key is an actual change in mindset, behavior, and process. Organizations have to implement, test, and learn. At Genentech, that looks like a policy that included everyone in the organization, whether marketing or analytics, or digital medical. Teams across a pharma co need to work as a unified system. Individual stakeholders can fuel the desire to continue to get better, to serve the patient, and to work together to do so.



From strategy through to what we're building out from content and our execution capabilities, we're able to have a discussion around an integrated campaign, rather than thinking about it from the perspective of where we are at a brand level, we're thinking through a certain patient...what this has opened up for us as an organization is that it's really allowed those conversations to begin early, and allowed us to build out living documents that we are going to be able to iterate over time.

Hannah Richards, Marketing Director, Portfolio Marketing: Marketing Excellence, Genentech



RESOURCE: Understanding necessary vocabulary and language is essential foundation and building blocks to drive user-centric marketing strategies and advance inclusivity in healthcare. For pharma, resources like Healthline Media's Conscious Language Initiative and education on the importance of [speaking the language of your audience](#), or this [glossary of key terms](#) that can be applied to the practice of cross-cultural marketing are great places to start.

A Practical Example - Genentech Clinical Trials

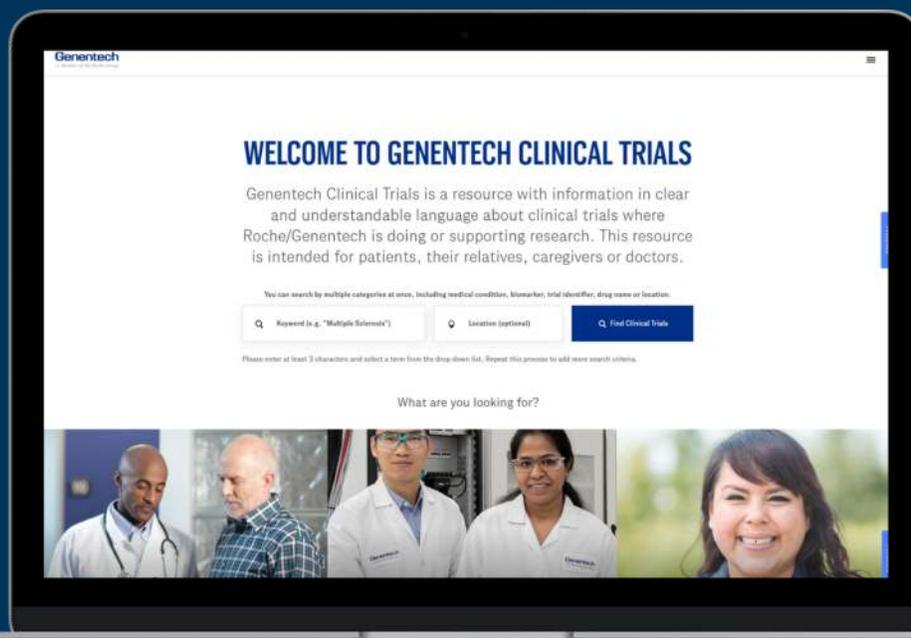
[Genentech-ClinicalTrials.com](https://www.genentech-clinicaltrials.com)

This cross-organizational success story is a result of Genentech and Roche teams recognizing that a patient pain point existed around the ability to locate and navigate clinical trial availability. The teams co-created a new resource designed to solve that patient problem. More than just a digital interface tool, thanks to the involvement of the study teams, there is an impressive backend process at work as well. Vanessa Braganza, Medical Digital Strategy Senior Director, U.S. Medical Affairs, Genentech explained how that developed internally.



We evolved our medical processes. Clinical Study teams create patient-focused language explaining their study. They can't write it the way that a doctor would understand it. They have to write it so that a patient can understand it. It then goes through review and approval, and can be published on our clinical trials patient website. So these are new steps, new processes that we haven't had to do prior, but we're doing now in order to be more patient-centric.

The early results have demonstrated the value in this patient-centered shift, with favorable feedback to date and an increasingly smooth customer experience.



COLLABORATION OUTSIDE THE ORGANIZATION



It's a different way of thinking with your AORs, with your marketing partners. It's ensuring that, for example, the website navigation's going to go a certain way because patients are telling us that's at the core of how they want to engage with our information.

Laura Mondragon-Drumright, Digital Engagement, Genentech

Pharma companies certainly have no shortage of options when it comes to finding partners in the industry who can share insights on patient needs & desires, connect brands and organizations to the patient along the journey path, and provide data that can help create a customer feedback loop driving ideal next best actions.

Attendees of the DHC Summit were able to hear the personal experience of Monica Haro, breast cancer survivor and community guide for Bezy BC, an online community created for those living with a chronic condition, hosted by Healthline Media. She offered her perspective on the important role of communities, providing patients with a safe and secure setting for emotional support and information.



I get the honor of curating a safe space for other people who have had a breast cancer diagnosis, to share and connect. I've always believed that breast cancer advocacy begins within the community first, sharing stories. People just want to be validated. They want to commiserate and celebrate their experiences with each other.

Monica Haro, breast cancer survivor and community guide for Bezy BC



44%

Like Monica, 44% of those living with a health condition feel as though others don't understand their condition or experience, as found in a Healthline Media survey. Yet, they are yearning to cultivate the connection and understanding.

Backed by research and an understanding that patients are much more than their condition, Healthline Media began providing condition-specific patient communities with the launch of MS Buddy in 2016, with the ad experience sponsored by Genentech. This led to product evolution with Bezy in 2022, a collection of patient-communities for a diverse set of conditions.



Pharma marketers can benefit from and should partner with trusted brands and patient advocates in brand-safe environments to become closer to the real needs of their target audience. These partnerships can act as a bridge to drive brand awareness and motivate patient action.

Jen Draeger, VP Marketing, Healthline Media

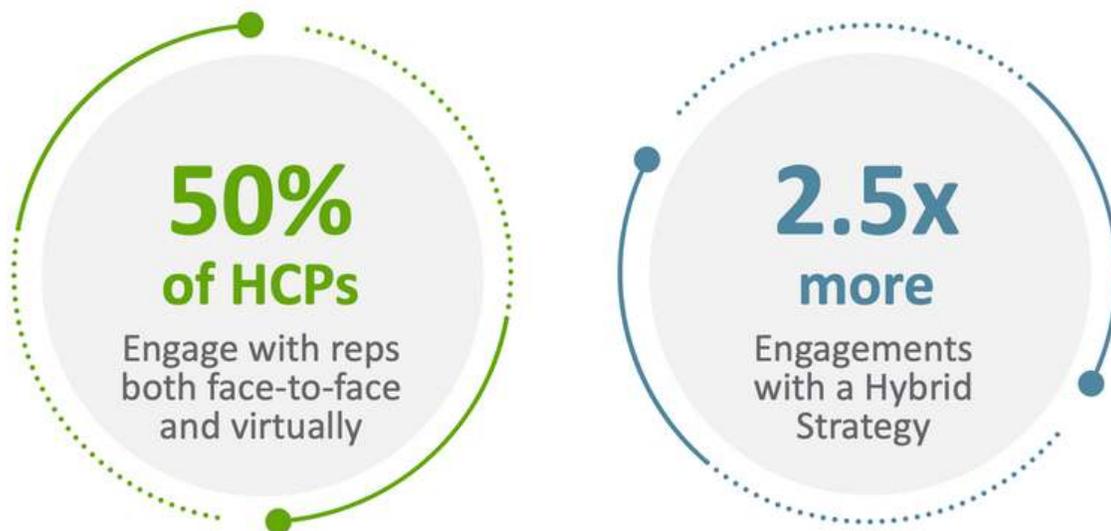
Research uncovered that emotional connection is the most powerful motivating force for somebody to join a community, with 70% of people who value online health communities doing so with emotional support and inspiration as their primary reason. People want to participate in spaces where people feel they can be their true authentic selves, and see themselves reflected in the content. Bezy's moderated platforms, led by real people like Monica, connect people with chronic conditions to share their experiences, find inspiration, and learn from one another. Guides welcome users to the app, respond to their inquiries and aid in fostering a sense of community where users feel seen and heard. The data shows that 81% of Bezy members find the content of the conversations in these forums to be valuable.

Patient communities are a ripe environment for social listening and gleaning audience insights. Based on how community members engaged with the platform, Healthline Media learned which offerings they find most valuable. For example, people living with MS value one-to-one connections, with members sending 350% more direct messages than the second highest condition community. With the patient at the center, understanding unique community needs can help pharma build more targeted, authentic approaches.



03 The Message Matters - And So Does Method of Delivery

While the focus of this piece is on the patient journey, it would be remiss not to consider how the HCP interaction with pharma factors in from both a customer experience angle and as a communication point for reaching patients. Healthcare now operates in both face-to-face and virtual landscapes. Customers, HCPs and patients, must be given the opportunity to connect remotely as effectively as in-person. Just as patients no longer have to wait to meet their medical practitioner face-to-face to get the best medical treatment, pharma's approach to HCP message delivery must also adapt. Data shared by Veeva at the Summit showed that if the HCP is engaged in a hybrid approach, they'll meet with a field rep on average roughly two and a half times more.



 Source: Pulse Data, US, April 2022 – September 2022

Copyright © Veeva Systems 2022



“We need a mind shift from doing things strictly traditionally to being digital, or better still, both.”

Jim Whitaker, VP, Business Consulting Lead, Veeva

It's also possible to bring HCP and patient communications together, as demonstrated by recent research conducted by Sharecare and IQVIA. Stacey Hagenbush (Executive Director, Strategic Partnerships, Sharecare) and Donna Rhoads (Associate Principal, Omnichannel Marketing, IQVIA) demonstrated to Summit attendees how zero-party patient data allows for the right message to be delivered to the patient and matched with an HCP message, resulting in a patient-HCP interaction that is more responsive and patient-centric. In essence, exposing the patient to the right information creates a synergistic impact on HCP and patient communication.



The challenge to the industry is to think differently about how you market to HCPs. You don't necessarily always have to lean in on the target list. You can put the patient data first, start there and bridge your strategy out from there.

Stacey Hagenbush, Executive Director, Strategic Partnerships, Sharecare

In all cases, the message itself matters. Crafted from the lens of compassion and a desire to address patient needs, marketers stress the urgency in getting the message right. Research completed by IQVIA demonstrates that if patients and HCPs are not getting cohesively orchestrated messages, the relative success of individual campaigns drops. While the healthcare industry is rapidly changing and adapting to new technologies, in order to provide the best possible care for patients, it needs to also move towards a more personalized approach, which considers each patient's individual needs and the message that best conveys a response to those needs.



You're not going to get a message across if you're not both speaking the same language to each other, about your patient journey and the doctor being aware of a brand.

Donna Rhoads, Associate Principal, Omnichannel Marketing, IQVIA

Did you know?



Providing content in an audience's native language can go a long way in message receptivity. A Healthline Media survey fielded in Spanish to health consumers about Type 2 Diabetes content reveals just how meaningful a more authentic and personalized messaging can be. In fact, 97% found the content in their native or preferred language to be extremely or very valuable.



91%

showed interest in viewing more articles and videos of medical conditions created with a Spanish speaking audience in mind



91%

want to hear personal stories from individuals within the Spanish community living with Type 2 Diabetes



88%

value a medical recommendation in Spanish to help provide a better understanding of the condition

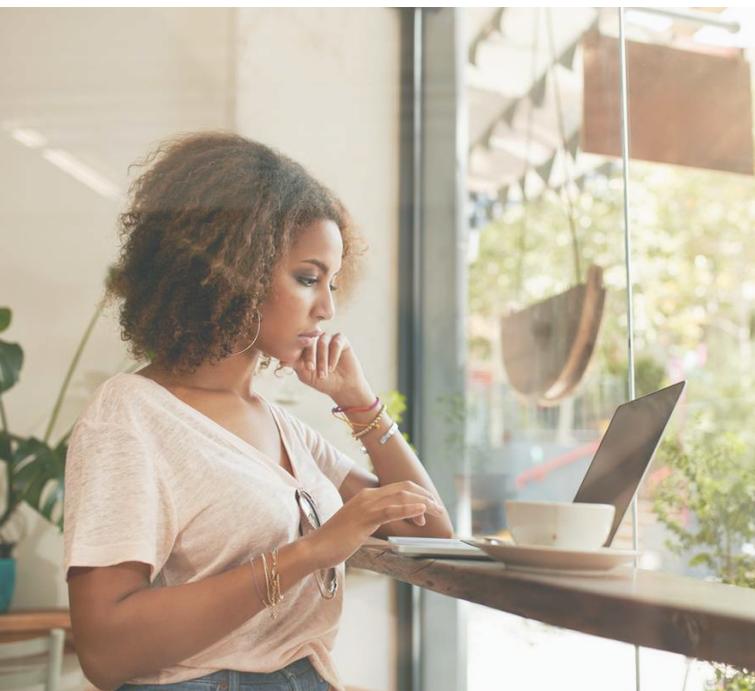
Genentech's Erica Taylor, spoke with DHCG's co-founder Mark Bard about the importance of culturally competent marketing, understanding and respecting the cultures of the people a company is trying to reach. Marketers need to understand not only the communities they want to engage in but also themselves and their own biases. The goal in crafting messages, once again, practicing compassion: put yourself in someone else's shoes and understand their perspective.

Especially when it comes to people living with conditions, the words we use can directly influence health outcomes. Without intentionality to see patients as a whole person, often brands miss the opportunity to connect with their audiences or provide resources that truly resonate. In fact, a Healthline Media survey found that less than a quarter of people of color feel that health and wellness sites do a very good job understanding the needs of people who share their ethnic background. Audiences that historically have been marginalized have to dig to piece their messages together.



And we need to be able to be adaptable to their needs. From a future state and future investments to think about, expanding the digital understanding and capabilities.

Tanya Shepley, Principal, ZS Associates and contributing author to [Reinventing Patient-Centricity](#)



Understanding a gap between existing resources and what audiences would like to see can help guide marketers' path forward. For example, 86% of Black and Hispanic respondents in a survey conducted by Healthline Media say that their ethnic background plays a role in the health information they seek. In addition, 51% say that medical recommendations is the #1 type of health content they want tailored to their ethnic background. There is opportunity for marketers to expand their messaging in a voice and cultural tone to meet the needs of diverse audiences.

04 Learn from the Data - And then Adapt

The question organizations need to be asking: 'Are we better than we were last year?' The answer is key as marketers look to compete against bad experiences. With so many customer surveys available today, standing out as an organization concerning customer feedback is to be mindful of when to solicit feedback and make it as frictionless as possible. And of course, responding to the feedback in a way that the audience feels valued will go a long way towards encouraging quality feedback in the future.



Our healthcare systems do have some agility and can move fast to meet patients' needs, and I think that we learned the same thing about ourselves being able to quickly flex into a virtual environment, understand how we could better engage customers.

Mandy Breckbill, Healthcare Executive Director, Genentech

The correct use of AI allows for ideal data collection, aggregation and analysis, driving organizations to become more customer-centric. Tanya Shepley echoes a concern that the healthcare industry is over-reliant on its channels, and only a small percentage of organizations are tailoring patient engagement based on patient preferences. Data democratization is a contributing issue, with only a small percentage of organizations feeling that their engagement matches their product life cycle. Additionally, orgs should measure the success of treatments using value-based outcomes, recognizing that experience and engagement should co-exist. Becoming too mechanical with engagement can strip out the humanity in the experience. The best experiences, even when driven by data, are ones that feel natural and seamless.

In the example of the Sharecare-IQVIA case study, the all-important measurement phase demonstrated how pharma can better bridge the communication gap between patients and HCPs.

CONCLUSION



Richard Schwartz

Life Sciences Industry CX
Practice Lead,
Medallia

We should be careful to get out of an experience only the wisdom that is in it—and stop there; lest we be like the cat that sits down on a hot stove-lid. She will never sit down on a hot stove-lid again—and that is well; but she will also never sit down on a cold one anymore.

- Mark Twain

I often ask pharma leaders to share a memorable customer experience with me in advance of meeting. I get wonderful stories about hotels, dining, online ordering, and support from industry tech icons. In each scenario (and they are almost always positive) the prevailing reflective sentiment is that people felt valued, heard, known; they were at the very center of the experience. I then ask about the experiences they have created and the ones they have had in health. The words they use are different.

The essential mindset shift we need to carry from our lives outside of pharma is to expect of ourselves (for our customers) what we expect for ourselves (as customers). In *Winning on Purpose*, Fred Reichheld dedicates an entire chapter to The Golden Rule. In it, he shares what some people call The Platinum Rule, “Treat others as they want to be treated.” We cannot know, understand, address and measure the impact of that without customer feedback.

I loved what Erica Taylor said during this DHC event about looking to retail. Our expectations for experience are set in wonderful places we go when we are not busy being prescribers and patients. Great retailers, tech, hospitality have pervasive and prevailing customer operating systems that we feel when we interact with them.

We should look to more experienced experience sectors to see how they gather signals and action on feedback. It is a skill.

Interpreting and acting on feedback is also a core organizational skill.

I also think we have to be bold as an industry. Think about what we make. These products are amazing, life changing and sometimes life saving. The experiences that surround them must be commensurate. We should be the one to chase and emulate—simply based on what we as an industry create.

We also have a trust problem to wrestle with in this industry and we know that acts of compassion (empathy with action) can enhance trust. Ashley Reichheld (Fred's niece) and her colleague Amelia Dunlop recent published [The Four Factors of Trust](#). Those pillars are Intent, Capability, Transparency, and Reliability. These line up nicely with what Genentech shared as their focus in patient experience optimization: Seamless, Consistent and Meaningful. In The Four Factors of Trust the authors also share that “trusted companies outperform their peers by up to 400% in terms of total market value.”

This all means that listening deeply and carefully to people (in this case customers and colleagues) and striving for what Genentech calls Seamless, Consistent, and Meaningful experience is not only a great way to run a life; it is a great way to run a business.

“Loving customers and creating promoters is an unbeatable business strategy.”

-Fred Reichheld, Bain Fellow, The Godfather of customer loyalty and the creator of the Net Promoter System™

It is hard not to have compassion for the customers we value. They are often in vulnerable and unfamiliar places and need us. Listening to them and demonstrating we are acting on feedback creates a connection far more valuable than an Rx for all of us. This is a mindset and skillset shift that is essential in what Laurie Myers and Genentech view as the essential industry evolution from patient friendly to patient centered.

Lead with Experience,
 *Rich Schwartz*

Meet The Experts

We would like to thank the following experts and thought leaders below for contributing their time and insights to this industry brief. What follows is a summary and highlights of the collective conversations with these experts.



Mark Bard

Co-Founder
The DHC Group



Vanessa Braganza

Medical Digital Strategy
Senior Director, U.S.
Medical Affairs
Genentech



Mandy Breckbill

Healthcare
Executive Director,
Genentech



Alex Cook

Senior Director, CMG
Strategy and Insights,
Genentech



Jennifer Draeger

Vice President,
Healthline Media



Christin Franklin

Executive Director
The DHC Group



Stacey Hagenbush

Executive Director,
Strategic Partnerships,
Sharecare



Monica Haro

Bezy BC
Community Guide



Alyssa Kopelman

Director, Corporate
Marketing
Healthline Media



Laura Mondragon-Drumright

Digital Engagement,
Genentech



Laurie Meyers

Executive Director
Patient/Customer Engagement
and Experience Design
Genentech



Fred Reichheld

Bain Fellow, Creator of
the Net Promoter
System, and Author



Donna Rhoads

Associate Principal,
Omnichannel Marketing,
IQVIA



Hannah Richards

Marketing Director,
Portfolio Marketing:
Marketing Excellence,
Genentech



Richard Schwartz

Life Sciences Industry
CX Practice Lead,
Medallia



Tanya Shepley

Principal,
ZS Associates



Erica Taylor

Vice President, Chief
Marketing Officer,
Genentech



Jim Whitaker

VP, Business
Consulting Lead,
Veeva

About the Project Partners

HEALTHLINE MEDIA

Healthline Media is the #1 digital health and wellness property, reaching the most people on their road to well-being. Our simple, human, and holistic perspective gives our audience of 85 million people each month more confidence in their health and wellness choices. We leverage the breadth of our reach and the depth of our insights to offer evidence-backed content, communities, and services that connect and engage with people at the right moment, with the right message, throughout their health and wellness journeys. Learn more at [HealthlineMedia.com](https://www.healthline.com).

Medallia

Medallia is the pioneer and market leader in Experience Management. Medallia's award-winning SaaS platform, the Medallia Experience Cloud, leads the market in the understanding and management of experience for customers, employees, and citizens. Medallia captures experience signals created on daily journeys in person, digital and IoT interactions and applies proprietary AI technology to reveal personalized and predictive insights that can drive action with tremendous business results. Using Medallia Experience Cloud, customers can reduce churn, turn detractors into promoters and buyers and create in-the-moment cross-sell and up-sell opportunities, providing clear and potent returns on investment. www.medallia.com



Expanding on the legacy of the 501(c)(3) nonprofit organization Digital Health Coalition, the DHC Group funds and conducts research, hosts and produces industry events, while offering media and outreach opportunities for its members. The DHC Group partners with numerous industry outlets, including the Digital Health Coalition, to drive industry thought leadership forward and make research-supported content available to a broader audience of pharmaceutical, media, publishing, technology, and advertising firms interested in the future of digital health, marketing, and customer experience. www.thedhcgroupp.com

THANK YOU!

