



Highlights from The Aurora Project

The top five insights from pharma's global patient-centricity survey

In March 2016, a global patient-centricity survey was completed achieving 2346 responses, chiefly from pharma company leaders working in 84 countries. Called 'The Aurora Project', the survey and analysis provide some very useful data on their beliefs and actions to make patient centricity work.

This short piece summarizes the top five survey insights. It also provides a glimpse to the origin (with thanks to the people involved) and future of The Aurora Project, and how it can help us meet our missions to grow in patient-focused ways.

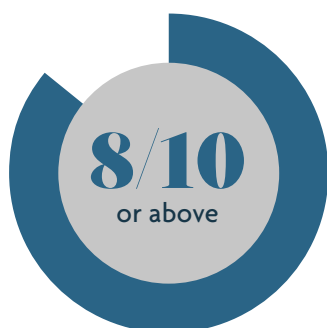
A more comprehensive discussion around the survey results has also been published and can be [downloaded here](#).

the Top 5 insights

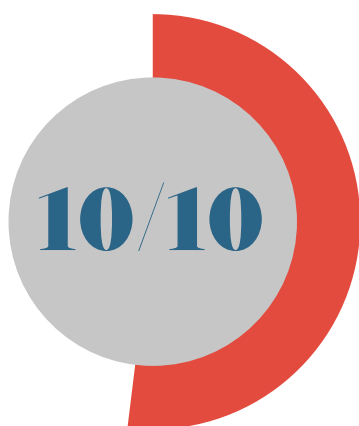
1

Patient centricity really is entering pharma's DNA – the industry believes this is important to its future

86% OF RESPONDENTS ranked the importance of Pharma to deliver on their patient-focused missions as



52% RANKED THE IMPORTANCE

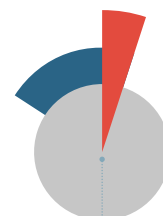


2

However, confidence to deliver is lagging, particularly amongst patients

21% OF ALL RESPONDENTS ranked their confidence in being able to deliver on their patient-focused missions as an

8/10
or above



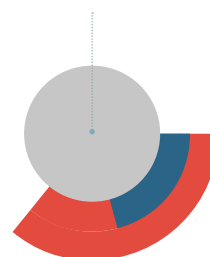
ONLY 5% RANKED THEIR CONFIDENCE AS

10/10

Responses were consistent across geography, role, size and type of organization, although

CEOs WERE SLIGHTLY MORE CONFIDENT:

36% of CEOs versus **21%** of all respondents ranked their confidence as eight or above



PATIENTS, HOWEVER, ARE LESS CONFIDENT:

Just 11.5%

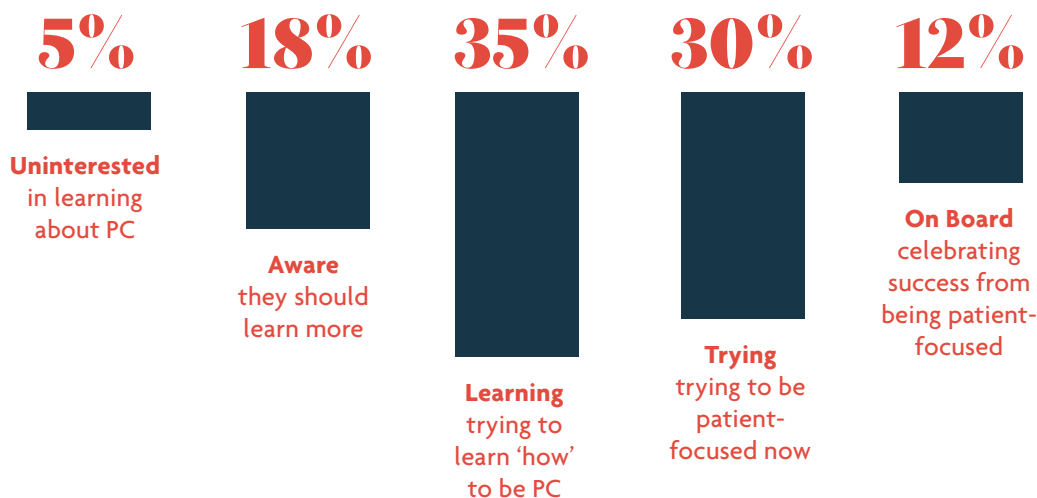
of patient respondents ranked their confidence as an **EIGHT OR ABOVE** (meaning 26.78% for the pharma/biotech/medtech group)

3

Pharma leaders want to learn more!

Most respondents are on the 'Studying' step, 'trying to learn the 'how' of patient-focus' (**35%**), or the 'Initiating' step where they are trying to be patient-focused now (**30%**).

Very few (**5%**) are uninterested while **18%** are aware they need to do this but haven't started trying.



To download a more comprehensive discussion around the survey results, [CLICK HERE](#)

4

The industry believes in a strong correlation between patient focus and profitability

A

Pharma employees believe a patient-focused strategy improves overall business outcomes

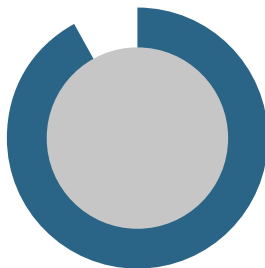


PATIENT-FOCUSED EFFORTS ARE REPORTED TO HAVE MEASURABLY IMPROVED OUTCOMES IN:

- HCP trust
- Employee engagement
- Stakeholder engagement
- Patient outcomes
- Patient trust
- Anticipated revenues
- Payers and government trust
- Employee attraction/retention

B

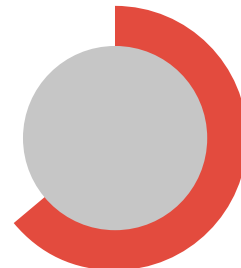
Pharma leaders believe that a long-term focus is required to implement patient-focused missions



92% OF RESPONDENTS
agree that a longer-term focus
is essential

C

Pharma leaders believe that they are genuinely working in the patients' interest



64% OF RESPONDENTS believe that patients' trust in their company would increase if they were to secretly observe a typical day in their department

To download a more comprehensive discussion around the survey results, [CLICK HERE](#)

5

Let's credit the things that pharma is doing right!

When asked to share best examples of creating value through focusing on the patient, the following were listed by respondents

1. Listening to the patient

- The creation of formal patient advisory boards
- Involvement of patients within regular internal meetings where their input might be of value
- 'Listening initiatives' to enable patients and patient organizations to better explain the patient journey
- Incorporating patient insights as deeply as possible into strategy and pipeline development
- Ensuring patient insights reach ALL members of the organization to highlight evidence of a patient-centric culture

2. Patient programs/tools/education

- Investing in patient information websites, apps and other resources
- Provide diagnostic tests and self-management tools to patients

- Offline support, such as call centers
- Work on easy-to-understand language and overall clarity

3. Leadership/Culture

- Visible mission and vision statement, reflected in on-the-ground tactics
- Changing focus within messages and type of language used to communicate with patients.
- Objectives to name, specifically, a focus on the patient
- Including PATIENT-FOCUSED KPIs within employee targets and incentives

4. Clinical trial design

- Early incorporation of patient insight into trial design.
- Co-creation and patient advisory board initiatives
- Clearer and better financial support for trial participants
- Better understanding of

commitment and individual approaches to trial participation

- Re-evaluation of protocols in the design stage to decrease the research burden on the participants

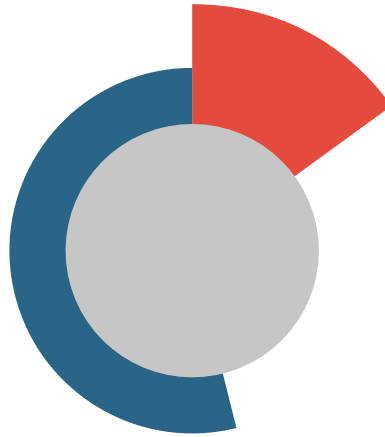
- Thorough analysis of visit schedules, invasive assessments, travel/hotel arrangements for patients and role of families/carers
- Greater adoption of interconnected digital tools for patient
- Simplification of trial instructions and helping patients to support each other

5. Access/pricing

- Affordability-based patient programs
- Loyalty schemes for successful adherence and/or co-operation
- Adoption of smart patient support programs
- Funding tailored to the responder group/patient

...but acknowledge that more can be done to turn patient-focused intentions into actions and outcomes

54% OF RESPONDENTS
say their company is
**making a
good effort**
to move
patient-centricity
forward



**ONLY 15% OF
RESPONDENTS**
say their company is
**doing
everything
it can**

Next steps

Pharma must now find the 'sweet spot' where both patient needs, HCP and business needs are met. **89% OF RESPONDENTS** believe it is paramount that people know how to find the intersection where best outcomes for the patient, HCP, and the company all coincide. And 79% of patients concur.



Background and Future of The Aurora Project

It has been several years since ‘patient centricity’ became an articulated objective for most in our industry. It is now understood that a major organizational and attitudinal shift, possibly even a new business model, is required, to make progress.

Some are convinced of this, and some are not. But, a world of ‘believers’ and ‘non-believers’ leads only to confused business planning – often within the same department. From discussions in late 2015, it became clear that if we were to go anywhere, we required two things:

1. A ‘wisdom of crowds’ approach to the definition of patient centricity in order to gain clarity of our objectives.

2. A global benchmark, to determine where we are now – so we can visualize progress on our upcoming journey.

Ultimately, our aim was to help move patient centricity from intentions to actions and outcomes. Thus a first draft of a survey was created by Jill Donahue of EngageRx and Paul Simms of eyeforpharma, with the help of an advisory panel of 23 who provided input via phone, email and group meetings. Later, the survey was refined with a group of 47 additional advisors. Both groups were comprised of patients and leaders from across the industry (mainly life science companies but also consultants) – participants are listed

below. It was decided that the invited survey participants would be, as far as possible, a balanced cross-section of our industry from across the globe – reflecting an even spread of seniority, geography, role and company size. In March 2016, we were able to gather 2346 full responses from over 80,000 invitees.

We’ve dubbed the survey “The Aurora Project” because, just like an aurora or polar light, this survey will be a natural light that is trying to sufficiently disturb and excite the industry to produce beautiful outcomes of varying colors and complexity.

What will be the impact of this illumination? Well that’s up to you.

Regarding the definition of patient centricity (item 1 in the above list), we aim to release more information about this in due course.

Note: This is an ongoing exercise – at the very least, we wish to repeat the survey annually. In addition, we have established a group of 800 volunteers – industry leaders – who are eager to contribute further. Please get in touch with Jill Donahue (jill.donahue@excellerate.ca) and/or Paul Simms (psimms@eyeforpharma.com) if you wish to be involved, or if you have comments.

For more information on opportunities to improve, download the whitepaper that contains more detailed analysis and commentary from industry leaders. It can be downloaded freely [here](#).

The Global Patient-Centricity Benchmark Survey: A Summary

GOAL: To help us move our patient-centric intentions to action and outcomes

Over 70 advisors in design

Over 800 advisors in interpretation, dissemination

2346 participants across 3 streams:

- 61 from Patient/groups
- 1150 from Bio/pharma /med device
- 797 from Solution providers
- 338 Other

84 countries

Project led by **Paul Simms** of *eyeforpharma* and **Jill Donahue** of *EngageRx*
Data collection completed March, 2016

To download a more comprehensive discussion around the survey results, [CLICK HERE](#)

Appendix 1:

What could we do better?

When asked what the one thing their company isn't doing that would dramatically improve their patient-focused execution, the following themes emerged:

1. Engage patients

- “Talk to patients”
- “Fully, proactively plan for patient engagement opportunities”
- “Regular and intensive discussions with patient focus groups and HCPs”

2. Reallocate budget/resources - only 38% agree that appropriate budget is provided to enable them to act on their patient-focused ideas

- “Provide enough resources so that employees are not struggling to meet the bare minimum regulatory obligations”
- “Our commercial colleagues are working in this area, but we are too understaffed and have too many other priorities to give this enough attention”
- “Obtain the correct training on what this means & how to implement it within our activities”

3. Measurement - 42% agree they measure their patient-focused efforts, 43% have patient-focused goals included in personal objective

- “Link it to existing metrics”
- “Make it a key element of every employee's annual objectives”
- “Set KPIs for all departments regarding patient focus and regularly check against it. Attach bonus to them”

4. Training – only 38% agree appropriate training is given, 78% either don't know what or how to teach or are looking for ways to train their people to behave in patient-focused ways that create better outcomes for all.

- “Training sales reps to put the patient first by demonstrating that from home office”
- “Obtaining the correct training on what this means & how to implement it within our activities”
- “Include something about patient centricity in our onboarding of every employee regardless of job title or function”

5. Focus across all departments - 49.37% feel that all departments should feel responsible for and/or demonstrate patient centricity but only 11.59% believe all departments do.

- “Senior leaders “talk” about it, and ask middle managers to “implement” it trying to make workers “do” it. We should be “doing” it at all levels”
- “Demonstrate how this is relevant in all roles”
- “The actual company-wide implementation fails; its not in the purpose of the company yet”

Appendix 2:

Contributors and advisers

Many thanks to the following group of volunteers who supported The Aurora Project from its inception:

Initial Advisory Group

Andrew Schorr, Founder & President, Patient Power

Anne Beal, Chief Patient Officer, Sanofi

Claire Jones, Director for People (HR) and Organisation UK/IE, LEO Pharma

Daniel Toutant, Manager Sales Force Effectiveness, Biogen Idec

David Davidovic, Founder, Path Forward

Dina Inverso, Strategy Leader Reimbursement & Patient Engagement, CSL Behring

Divya Mishra, Director Global Biosurgery Portfolio Management, Sanofi

Gabriela Mondino, Global Marketing Director, Sanofi

Helena Bargiel, Sr Manager Commercial Excellence, People and Compliance, Region International, LEO Pharma

Henrik Finnern, Head of Global Patient Advocacy Relations, Boehringer Ingelheim

Jack Whelan, Researchy Advocate, Jack-Whelan.com

John Bonasera, Executive Director Sales Strategy & Execution, Boehringer Ingelheim

John Elliott, Global Partnership Evangelist, EngageRx

Kellan Barfield, Associate Director Commercial Excellence EMEA, Gilead Sciences

Lode Dewulf, Chief Patient Affairs Officer, UCB

Mark Duman, Non-Executive Director, Patient Information Forum

Matt Portch, VP Managed Markets, Sunovion Pharmaceuticals

Michael Edwards, Senior Director - Patient Relations, Insights & Stakeholder Management, LEO Pharma

Michael Moran, Vice President US Head of Sales, Eagle Pharmaceuticals

Richard Murray, VP & Deputy Chief Medical Officer, Merck

Robert Dickerson, Head of Commercial Excellence EGM, Novartis Oncology

Stephanie Manson, Value Evidence Leader, Novartis

Ulrich Neumann, Managing Director USA, eyeforpharma

Extended Advisory Group

Alan Thomas, Founder, Ataxia and Me

Alan Wade, Director, Patients Direct

Alexander Kopylov, Medical Marketing Projects Head, The Market Group

Amber Esco, SVP Strategic Accounts, M3 USA

Andre Darmon, President, Strategik & Numerik

Andy Jones, VP Pharmaceutical Innovation, AstraZeneca

Anita Burrell, Principal, Anita Burrell Consulting

Beverly Smet, Vice President, Across Health

Charlie Grieve, CEO, Brandcast

Christopher Esposito, Institutional Director, AstraZeneca

Dan Miller, Business Unit Director, Roche

Danielle Derijcke, Global Patient Affairs Officer, UCB

David Clarke, Managing Director & Consultant, Ethical Reach

David Dellamonica, Global Integrated Care Diabetes & Cardiovascular, Sanofi

David Hauben, Director Emerging Markets Strategic Planning, Merck

Dee Sparacio, Blogger, Women of Teal

Detlev Parow, Head Care Management Development, DAK-Gesundheit

Donna Hui, Senior Account Director, Ariad Health

Douglas Bock, Principal & Co-Founder, Vivaleas

Eran Kabakov, CEO, Doco.la

Eva Mitchell, VP Business Development, Ashfield Healthcare

Fonny Schenck, CEO, Across Health

Gabor Gyarmati, Founder, Health 2.0 Hungary

Gareth Dabbs, Principal, IMS Health

Graham Leask, Lecturer in Strategy, Aston University

Jean Paul Lemmens, Managing Director, Commercial Health Consulting

Jeanne Barnett, President & Founder, CysticFibrosis.com

Joyce Avedisian, CEO & Founder, Avedisian Management Consultants

Kathy Foris, Vice President - Scientific Affairs, LEO Pharma

Kay Warner, Director – Focus on the Patient, GSK

Keir Rothnie, VP Business Development, Dialog Direct

Kimberley Stoddart, VP Human Resources & Communications, LEO Pharma

Leilani Latimer, Senior Director Global Marketing, Zephyr Health

Marc Boutin, CEO, National Health Council

Marsha Caplin, VP Innovation, Ashfield Healthcare

Nadir Ammour, Global Domain Head Patients & Partners, Sanofi

Nuria Zuniga Serrano, VP, Lupus Madrid

Paul Robinson, R&D Director Europe and R&D Global Seven Seas, Merck

Peter Aksel Villadsen, Vice President, LEO Innovation Lab, LEO Pharma

Pierre de Nayer, Managing Director, Citobi

Robert Horne, Director of the Centre for Behavioural Medicine, UCL

Simon Davies, Executive Director, Teen Cancer America

Susanne Kellenaers, Director Multichannel Management, Daiichi Sankyo

T Anthony Howell, CoFounder & Chief Operating Officer, Clear Pharma

Tania Caballe, Consultant, Avantgarde

Valerie Metil, Executive Director Program Design & Strategy, Quintiles

Special thanks to Lode Dewulf and UCB for their text analysis of the definition of patient centricity, part of another phase to The Aurora Project, coming soon.

Special thanks to Stephanie Manson for her generous advice in the data analysis phase.