

How Patient Journey Marketing™ delivers more value to your customers and your bottom line

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How patient-centric marketing delivers more value to your customers and your bottom line

Executive Overview

We are witness to a marketing revolution that is changing how consumers and patients gather information and make decisions regarding their healthcare. Through online and emerging media, consumers and patients are in control of how, when and where they gather information and engage with messaging.

Healthcare marketers have the opportunity to respond to this revolution by shifting marketing communications from a patient-centric model to Patient Journey Marketing™. In Patient Journey Marketing, healthcare marketers can segment, align and deliver messaging with the emotional stages the patient goes through when diagnosed with a disease. Integrating patient feedback tools as a way to gain deep patient insights not only leads to better, more effective marketing, it also supports product development and new indications. And managed markets receive less risk. The value of Patient Journey Marketing is to create a **Right Message, Right Time, Right Placement** approach so that communications engage the patient meaningfully, and most importantly, when the patient is ready and able to hear and take action. This is the key.

Patient Journey Marketing can result in better patient outcomes. It strengthens retention and builds loyalty. It can lower associated healthcare costs by creating better compliance.

Marketers will be well-served by shifting strategy and dollars into a right message, right time, right placement approach. It will result in further reach and more lasting impact as patient feedback tools and technologies are being integrated more assertively across the patient journey.

“To get through the hardest journey we need take only one step at a time, but we must keep on stepping.”

— Chinese Proverb

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From Marketing Planning to Patient Journey

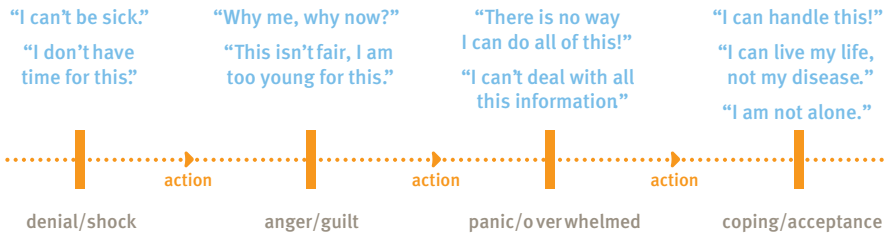
In the U.S., direct-to-consumer (DTC) marketing is, relatively speaking, in its youth. And it's coming of age during a turbulent time where marketing standards and conventions are being overthrown by emerging channels that give more power and control to the consumer. The industry is also under the watchful eye of the public and the FDA. However, like never before, healthcare marketers have the tools, technologies and channels to deliver personalized content that will both support the patient and garner their direct participation and feedback — all with the end goal of helping the patient achieve a better health outcome. This transparency and participation will help regain public loyalty and trust.

The patient-centric approach is not new to healthcare marketers. But as the DTC industry evolves, and the marketing tools and technologies grow more sophisticated and consumer-oriented, it's time to refine the approach. It's not just about educating the patient, but empowering them as well. It's a shift from patient-centric marketing to Patient Journey Marketing.

At the heart of it all is the patient journey — a patient's path through a series of profound emotional phases, frequently marked by denial, shock, anger and stress before the patient is able to accept and cope with their disease state (See Figure 1). Each point in this journey can drive the patient to react to and engage with different messaging and types of information as they work through medical, emotional, personal, financial and lifestyle issues.

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FIGURE 1: THE PATIENT JOURNEY



Patient Journey

It is important to understand and segment the individualized behaviors of patients and recognize that their journey will have its own twists and turns.

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The challenge, then, for healthcare marketers is to get it right: **Right Message, Right Time, Right Placement**. By aligning the marketing strategy with the patient journey, healthcare marketers will engage the patient meaningfully when they are ready and able to hear and take action.

The value and opportunity of Patient Journey Marketing is multi-faceted. The patient receives more personalized communications to help with symptoms and manage their disease, which can potentially lower associated healthcare costs by creating better compliance. Marketers have the opportunity to receive direct feedback from patients, which can help influence new product development and indications. Managed markets receive less risk. It is a win-win situation for all key stakeholders.

Marketers Increasingly Focus on Patient Communications

FIGURE 2: CHAOTIC COMMUNICATIONS ENVIRONMENT



Healthcare marketers are beginning to witness a shift to the concept of Patient Journey Marketing. In a recent PharmaVoice/Cramer survey, out of 108 respondents from the healthcare industry, 65% indicate that patient communications are very important for their company's marketed products. Another 23% indicate that patient communications were

important, but not a high priority. Proposed spending supports these statements. Survey respondents predict that more of their company's marketing budget will be allocated to patient retention in the next 3-5 years than is currently allocated. Nearly one-third state that at the present time, less than 10% of their corporate marketing budget goes toward patient retention. However, the majority believe that this percentage will increase to 21-40% of their marketing budget in the next 3-5 years.

Marketers will be well-served by shifting strategy and dollars into **Right Message, Right Time, Right Placement**. It will result in further reach and more lasting impact as patient feedback tools and technologies are being integrated more assertively across the patient journey.

Marketers are now faced with trying to integrate their messaging with the patient in an arena that is beyond their control. Patients grab bits and pieces of information here and there, in no particular order, with no discernable context. Information can't be just "floating" out there with the hope that people get it. Marketers have to make their messaging clear and meaningful to patients.

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In the Patient's Shoes: Traveling the Patient Journey

The adage “content is king” is outdated. Today, consumers and patients seek advice, recommendations, guidance and community. In other words, they seek information that is relevant to their needs and wants. It’s still content, but it’s crafted for an audience of one; the patient. It is certainly known that it “takes a village.” Family, friends, caregivers, doctors and nurses, and advocacy groups are all part of the equation. However, for this whitepaper, the patient is the focus.

A marketer can not efficiently craft one message that is relevant to all patients. But since most patients with the same disease travel similar journeys, it is possible to create messaging that resonates at various stages of the patient journey. The purpose is to help patients achieve smaller, proximal goals along their journey, instead of asking them to make big leaps that can frighten or overwhelm. Because each disease offers its own set of challenges and milestones that influence patient behavior, primary research uncovers motivations, goals, and behaviors of key segments so that targeted messaging can be authentic and relevant.

As the Chinese Proverb wisely advises, “it’s all about taking one step at a time as a way to keep moving forward.” By aligning messaging to the patient journey, the goal is to make the journey both attainable and sustainable for the patient.

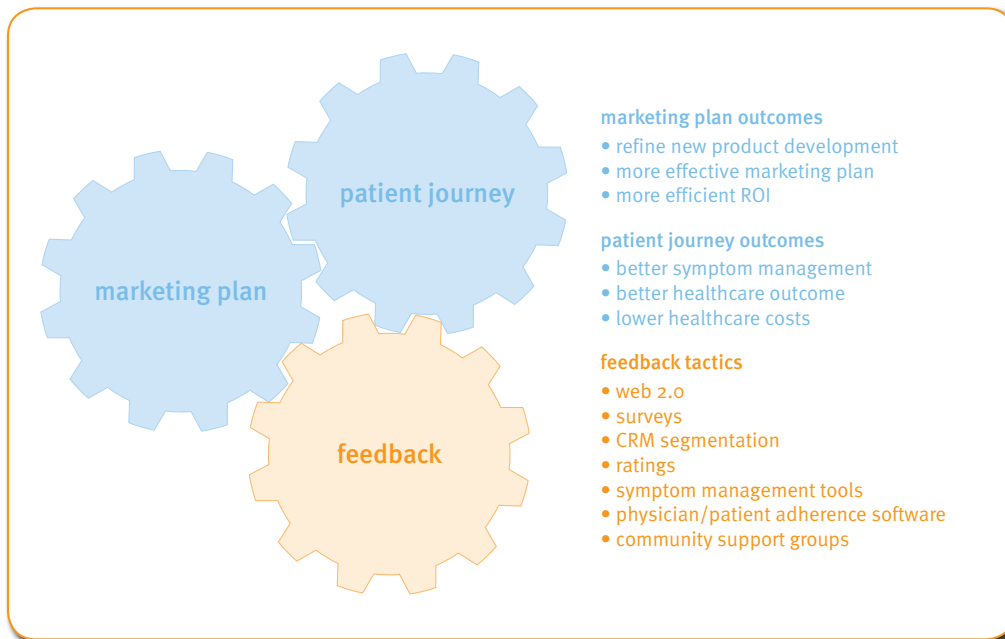
Feedback is Key

Feedback tools are key to creating patient journey communications. How do you know when a patient can hear and absorb certain messaging? How can you identify where the patient is in the journey? Polls, FAQs, symptom management tools, checklists, surveys, patient/physician adherence software and ratings all offer ways for the patient to provide feedback. For example, tracking and analysis technology now allows marketers to identify what stage the patient is in when they click on a particular FAQ. The more feedback marketers can gather relative to stages of the journey, the more insight marketers can glean into when the patient is ready and able to hear the next message. The result? Marketers can help guide the patient on the journey, keeping them compliant and adherent and on their way to a better health outcome.

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With patient feedback, healthcare marketers can not only develop relevant messaging that is aligned to the patient journey, they can also determine when the right time and place is to deliver that messaging (See Figure 3). The next challenge is to figure out what tactics and delivery methods work better at different stages of the journey.

FIGURE 3: PATIENT JOURNEY MARKETING



When marketing is aligned with patient feedback and the patient journey, healthcare marketers can expect more value for all stakeholders.

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Making the Case for ROI

When healthcare marketers plan their mix of communications tactics, they like to know that the tactics are tested and proven. In fact, in the recent PharmaVoice/Cramer survey, respondents overwhelmingly chose proven ROI (42%) as the biggest driver that influences the marketing mix. Yet as new channels and emerging media shake up the foundation of 'marketing as we know it,' marketers may have to integrate new tactics that do not have a storied history of positive return. Integrating new tactics, however, shouldn't be a complete leap of faith. Healthcare marketers can build from those innovative tactics that they already know are receiving a return, such as online video, which typically receives a higher click-through rate than areas of static content. They can also learn from industries that are on the leading edge of marketing innovation, vigorously testing new channels and tactics. Most importantly, by aligning messaging with the patient journey, healthcare marketers will ultimately find a balance of integrating proven tactics with new and innovative ones and eventually, the ROI will follow. Marketers completely understand this requirement and pursue it vigorously.

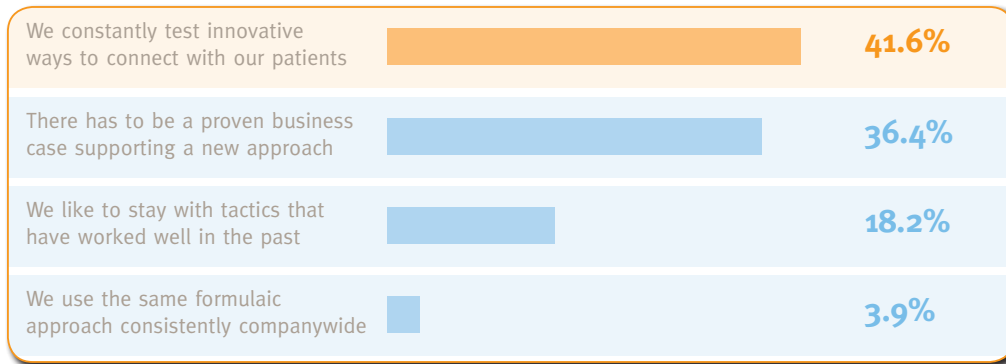
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What Tactics Work When?

There is a paradigm shift happening, and no one has patented a singular formula for success. In fact, the waters remain largely untested. In 2007, the pharmaceutical industry spent less than 5% (\$76.5 million) of its \$5.37 billion DTC advertising budget online. Yet with U.S. consumers spending an average of 18-20 hours online per week, a sea change has come, and fast.[†]

In the recent PharmaVoice/Cramer survey, over 41% of respondents indicate that their companies test new and innovative ways to connect with patients (See Figure 4). As consumers and patients readily adopt new ways to gather information, get informed and make choices regarding their health, marketers who learn to leverage emerging media and innovative ways to communicate will thrive in the user experience economy.

FIGURE 4: ARE HEALTHCARE MARKETERS IMPLEMENTING INNOVATIVE COMMUNICATIONS?

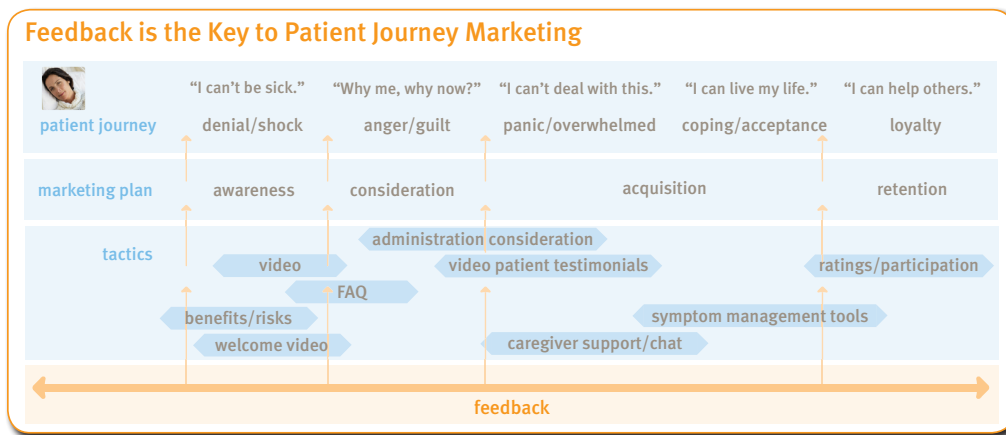


Figuring out when, where and how to deliver patient messaging starts by overlaying the stages of the patient journey onto the marketing funnel (See Figure 5). The goal is to connect segmented, ‘personalized’ messaging with patients in various stages of the patient journey.

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While there is still much to test, understand and learn in the new user experience economy, there is some success and knowledge to build upon to help healthcare marketers determine what tactics perform better at particular stages in the patient journey.

FIGURE 5: FEEDBACK IS THE KEY TO PATIENT JOURNEY MARKETING



Innovative Tactics Support ‘Right Message, Right Time’ Delivery

A key element to successful Patient Journey Marketing is to continually offer the patient ways to opt-in to future communications. This allows the healthcare marketer to develop a personalized communications path that will support the patient and help them along their journey. It is critical for databases to be able to manage the patient’s segmentation and date of opt-in so that future communications will be relevant and timely.

Historically, healthcare companies have invested heavily in mass media to create awareness. According to the Pew Internet & American Life Project, the internet is transforming healthcare in the United States. Pew reports that nearly 113 million Americans have searched online for health-related information.* Due to the rising number of online consumers, search marketing is quickly becoming a top performer for the newly diagnosed. In fact, in the survey conducted recently by PharmaVoice and Cramer, 74% of respondents indicate that they used search marketing in the awareness phase.

A good search marketing plan is continually analyzed and fine-tuned for incremental improvements in performance. It can also be segmented for different stages of the patient journey. For instance, since the naïve patient does not have a highly-developed disease

Feedback is essential to Patient Journey Marketing. When marketers incorporate tools that enable patient feedback, they can build more efficient, effective marketing outcomes.

Opt-in

Search Marketing

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state vocabulary, marketers might uncover words and terms that the newly-diagnosed uses when searching online by reviewing blogs, discussion boards and other areas of user-generated content. These searches should lead the newly-diagnosed patient to a comforting place where they see themselves reflected in imagery and words. The goal, as always, is to encourage the patient to continue to take small steps further into their journey.

Search marketing can also support later stages of the patient journey by incorporating a larger, more sophisticated vocabulary around the disease state and leading patients to more specific messaging such as symptom and side effect management tools or information about financial and lifestyle issues. Zealots and early adopters will move through this process more swiftly than others.

Websites are also a top performer in Patient Journey Marketing, with a unique ability to support patients at every phase of the journey. Even so, 84% of respondents indicated in the recent PharmaVoice/Cramer survey that they use web marketing heavily in the awareness phase. Wyeth's KnowMenopause.com does an exceptional job in helping naïve patients understand the menopause journey. It offers a bright, clean design and simple navigation that allows the patient to "hear from real women," "learn from real doctors" and understand "menopause basics." The site integrates video seamlessly onto the page so that women can see and hear from others like them in a high-impact format.

Email marketing is perhaps the most controllable, most personalized tactic available. Marketers can narrowly target emails not only to specific segments (for example, new on therapy), but they can also control timing. Abbott recently launched a new 24-week online program that helps people with diabetes better manage their condition through nutrition, activity, and lifestyle choices. The online program asks patients to opt-in and self-identify by selecting which week of the program they are in so that targeted, segmented content can be delivered weekly to the patient. Email also offers an easy, seamless transition to additional supportive content, such as symptom management tools or drug administration videos. Serialized email marketing is generally more effective for acquisition and retention because segmenting, messaging and timing can be so tightly controlled.

Websites

Email Marketing

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Rich media can provide powerful ways to help support patients in their journey. Interactive self-assessment surveys can help naïve patients move from denial to self-identifying with a disease state. GlaxoSmithKline’s weight loss product alli offers an interactive self-assessment survey in the “Am I ready?” section on myalli.com. Consumers take a short quiz regarding their eating habits and receive a tailored response that provides honest information about how their eating behaviors need to change if they are to commit to alli’s comprehensive weight loss plan. Rich media can also be used to create interactive symptom and side effect management tools that can help patients with adherence.

Incorporating online video also offers another way to provide a rich user experience, as KnowMenopause.com has done. Whether it’s personal stories, symptom management tips or drug administration videos, video can be informational, motivational and powerful all at once, providing a real human-to-human connection. Making video available to download provides an additional way for patients to engage with messaging when they are ready to hear it.

Webcasting and webinars are another form of online video that are becoming readily accepted tools for patient education and physician education. Regular, serialized live webcasts featuring medical experts and patients living with a disease can create a strong sense of community among patients who are hungry for deeper information about symptom and side effect management, as well as lifestyle themes (exercise, nutrition, emotional and financial impacts). Live webcasts can be archived, continually engaging patients who are seeking particular content.

Rich media, online video and webcasts can integrate seamless feedback mechanisms, such as polling, surveys and user ratings that can teach the marketer a lot about what content the patient wants to see and hear, and when the patient wants to engage with it. While Burger King’s® award-winning viral campaign “Subservient Chicken” (www.subservientchicken.com) was designed solely as branded entertainment, it showcases the power of customizable on-demand video. Imagine the impact if a patient could ask a physician about a side effect and receive a personalized video response.

Rich Media

Online Video

Webcasting and Webinars

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Conclusion

Over the years, healthcare marketers have largely shifted the focus of their marketing to include patients as well as physicians. As the industry continues to mature, and consumers and patients become more in control of how, when and where they want to engage with messaging and brands, healthcare marketers can evolve patient-centric marketing into Patient Journey Marketing.

Patient Journey Marketing will result in more compliant patients, lower associated healthcare costs, streamlined development of new products and indications as well as more efficient, effective marketing plans. Marketers who craft segmented messaging, incorporate patient feedback mechanisms and align messaging and tactics with the Patient Journey will thrive in the new user experience economy.

Sources:

† 14th Annual DTC Report (MedAd News, May 2008)

* Online Health Search 2006 (Pew Internet & American Life Project, 2006)

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About Cramer

Cramer is a digital marketing and event solutions agency that fuses creativity and technology to design and execute experiences that move audiences.

Cramer Healthcare is a specialized practice within Cramer, a privately held company located in Norwood, Massachusetts. For more than 25 years, the agency has helped the world's leading and emerging brands win and retain loyal customers, launch products and inspire sales teams. Reaching audiences online, offline, through emerging media, and face-to-face, Cramer creates personalized, integrated marketing programs and events that maximize marketing impact — and their clients' dollars.

We work with clients who market medicines, diagnostics, and devices to stakeholders, providing the right solution at the right time.

Cramer's healthcare clients include, Boston Scientific, EMD Serono, Inc., GE Healthcare, Gillette, Healthcare Business Women's Association, New England Journal of Medicine and ViaCell, Inc. For more information please visit www.cramerhealthcare.com.

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