UNLOCKING COLLABORATIVE, PATIENT-CENTRIC PARTNERSHIPS:

Ipsos' approach to developing sustainable, long-term partnerships and ensuring patient inclusion

An Ipsos White Paper

Authors: Alexis Anderson,
Adam Kaufman and Rebecca Cohen
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Executive Summary

In 2022, the healthcare industry remains in a state of transformation, driven in part by an influx of digital solutions and data, a shifting regulatory and reimbursement landscape, and increased demand for more personalized therapies. At the heart of all these changes lies a patient-centric desire to deliver more efficient, effective, and equitable care for people and patients. However, despite 'patient centricity' being a topic of importance across the industry for the last decade, many organizations still experience challenges with translating positive intent to true transformation and action.

At Ipsos, we believe that the time is long-gone for patient-centric strategies without tangible action and measurable outcomes. At the same time, we acknowledge that navigating the path forward can be complex. For those that experience these challenges, one of the best places to start can often be establishing (or re-evaluating) your strategy for external partnerships and opportunities.
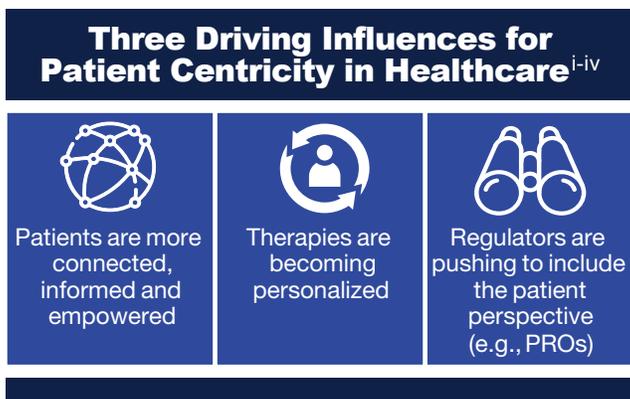
In order to meaningfully support patients, it is essential that healthcare industry stakeholders and PAGs partner with a long-term mindset and alignment on a long-term vision. It is for this reason Ipsos has designed and implemented a strategic approach to partnership assessments—one that enables both sets of stakeholders to ensure they are aligned at the onset. This framework—centering at the highest level on 'voice' and 'value'—supports stakeholders with taking a measured, thoughtful, and strategic approach identifying partners of interest.

Now, more than ever, it is essential that healthcare organizations demonstrate their ability to meet patients and consumer needs. At Ipsos, we can help you take that first step.

Introduction

Patient centricity calls for the healthcare industry to include patient experiences, incorporate insights and increase access to care throughout their strategy and product development.[1] As patients become more informed about their health, they expect increased transparency, responsiveness, and mutual understanding in the healthcare industry.[2] This accelerated shift to patient-focused processes emphasizes the need for all healthcare organizations to include patient needs and insights throughout their strategy and product development (Exhibit 1).[3]

Improved patient outcomes are a major focus for all healthcare stakeholders. By cultivating effective and long-term partnerships with patient-centric organizations, the healthcare industry can truly progress and maximize its impact on patients. Across the healthcare industry, organizations understand the call for patient engagement in healthcare decisions, yet it can be challenging for them to navigate and find ways to identify these opportunities.[4] Ipsos believes that Patient Advocacy Group (PAG) partnerships are where healthcare organizations need to begin. We have developed a comprehensive approach to support all stakeholders in navigating this transformative period.

Three Driving Influences for Patient Centricity in Healthcare[i-iv]

Patients are more connected, informed and empowered	Therapies are becoming personalized	Regulators are pushing to include the patient perspective (e.g., PROs)

Exhibit 1: **A Patient-Centric Future:** Product development is moving to incorporate the patient at all points in the lifecycle, influenced by patients' access to information, the advancement of personalized medicine, and updates to legislation.

PAGs as Partners

Historically, the main stakeholders in product development tended to be pharmaceutical manufacturers, providers, payors, and policymakers. Until recently, patient involvement in product development has been limited to input post-launch, typically relying on others to speak on the patient's behalf. Due to changes across the healthcare landscape, product development must now consider the perspectives of multiple additional stakeholders, including patients, PAGs, professional societies, research organizations, and others (Exhibit 2). This refreshed model has moved from a linear structure to one that is more agile, iterative, and inclusive of patients, enabling patients to contribute in more meaningful ways.[5]

Historical model for product development
Linear, product development insights from limited stakeholders, ending with patient consumption

Current/Future model for product development
Multi-stakeholder engagement* and durable partnerships across groups will be an iterative, agile process beginning and ending with patient input

Pharma
Providers
Payers
Policymakers
Product Development
Patient utilization

Pharma
Providers
Payers
Policymakers
Patient Centricity
Patients
PAGs
Research Consortiums
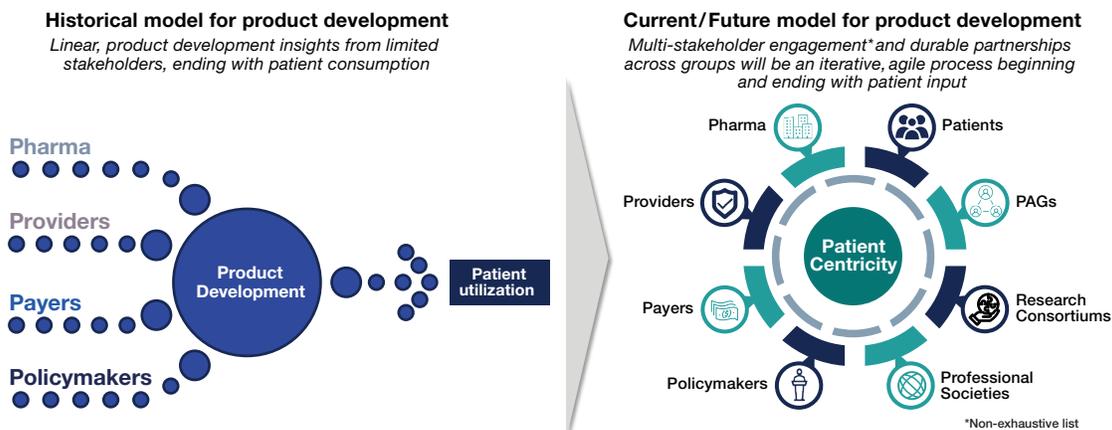Professional Societies
*Non-exhaustive list

*Exhibit 2: **Influential Stakeholders within Healthcare:** With time, the healthcare industry has become a larger ecosystem consisting of multiple stakeholders, including PAGs and other organizations that are increasingly influential.*
*Note: non-exhaustive list.

As the landscape transforms to a patient-focused model, PAGs are increasingly important to engage with as key stakeholders. They act as trusted partners, advocates, and liaisons for patient communities, in addition to providing resources, activities, and support to these patients. PAGs represent a broad audience of patients, including the marginalized, and address their experiences, unmet needs, and perceptions across therapeutic areas. For example, PAGs and pharmaceutical manufacturers share a vision of improving the overall experience for patients, just through different approaches (Exhibit 3). This shared vision provides a mutually beneficial opportunity for highly engaged PAGs and pharmaceutical manufacturers to work together as they promote trust and transparency between patients and healthcare organizations, and improve the resources available to the patient.

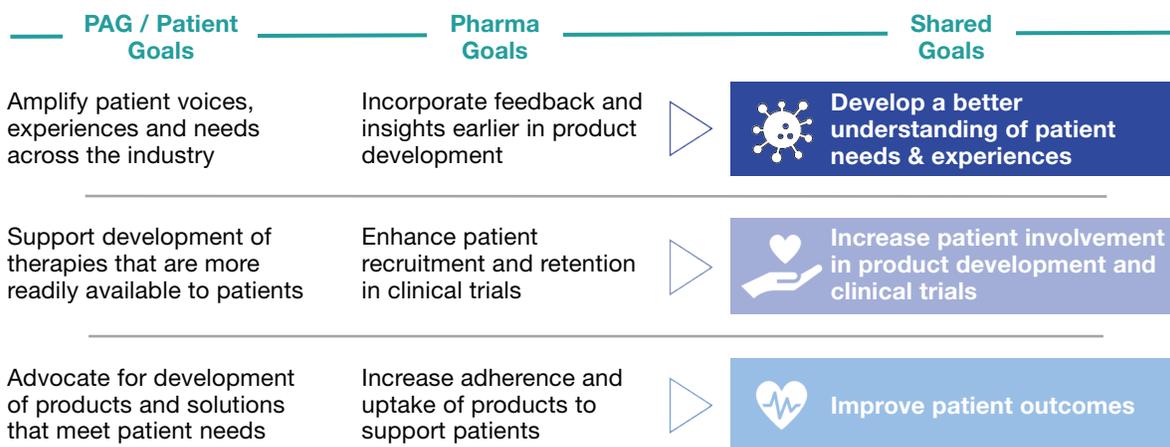| PAG / Patient Goals	Pharma Goals	Shared Goals
Amplify patient voices, experiences and needs across the industry	Incorporate feedback and insights earlier in product development	**Develop a better understanding of patient needs & experiences**
Support development of therapies that are more readily available to patients	Enhance patient recruitment and retention in clinical trials	**Increase patient involvement in product development and clinical trials**
Advocate for development of products and solutions that meet patient needs	Increase adherence and uptake of products to support patients	**Improve patient outcomes**

*Exhibit 3: **PAG and Pharma Goals:** The mutual aims of PAGs and pharmaceutical organizations provides a connection that can be used to continue the push toward patient-centricity.*
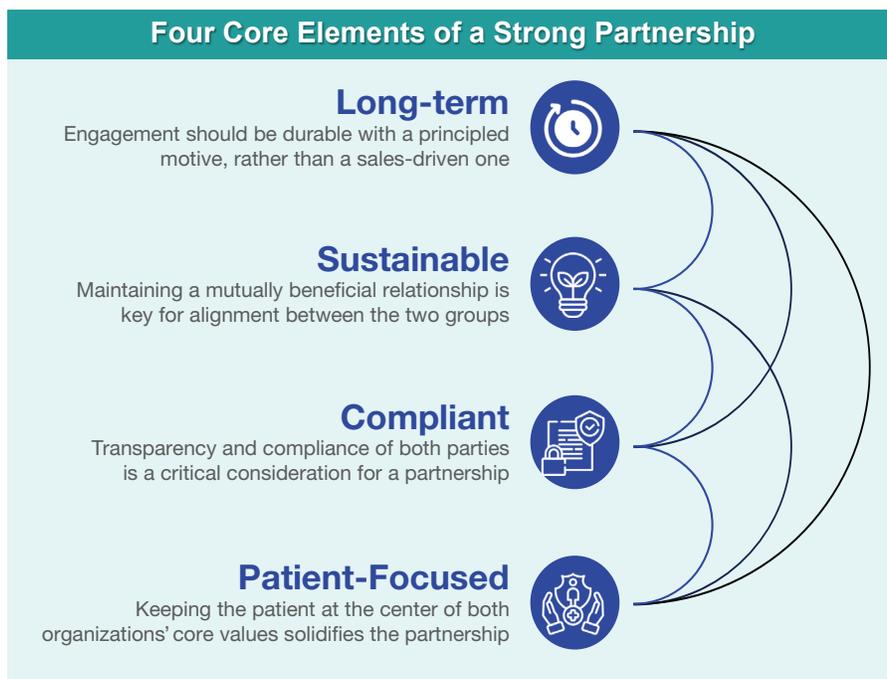
Ipsos' Systematic Framework

Finding the "right" partner can be challenging. There are plenty of groups and manufacturers to choose from, but not all have shared visions, missions, capabilities, or impacts. For example, in the United States, there are roughly one million adults with Multiple Sclerosis and approximately eleven national PAGs, more than forty local Multiple Sclerosis groups, eight research consortiums, and six professional societies (Exhibit 4).[6, 7]

40+ Local MS Groups

11 National MS Groups

8 MS Research Consortiums

6 Professional Societies

60+ Groups to Choose From
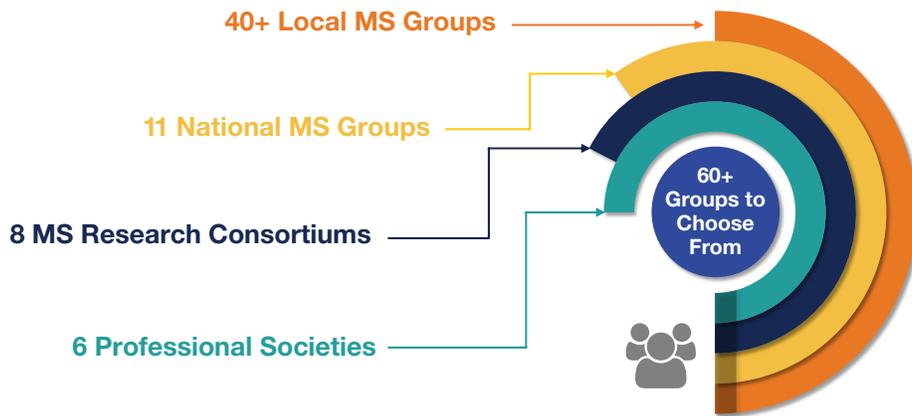
*Exhibit 4: **Multiple Partnering Opportunities in the US Multiple Sclerosis Space:** Connecting with the right partner can be overwhelming but will help navigate the diverse and large scope of patients.*

Due to the variety of PAGs and healthcare organizations, aligning with the "right" PAG and other types of patient organizations is necessary to produce well-intentioned, successful, and impactful products for patients. Ipsos believes the core elements of a strong partnership are longevity, sustainability, compliance, and patient focus (Exhibit 5). These qualities are the pillars of a lasting relationship. So, how does one determine whom to partner with?

Four Core Elements of a Strong Partnership

Long-term
Engagement should be durable with a principled motive, rather than a sales-driven one

Sustainable
Maintaining a mutually beneficial relationship is key for alignment between the two groups

Compliant
Transparency and compliance of both parties is a critical consideration for a partnership

Patient-Focused
Keeping the patient at the center of both organizations' core values solidifies the partnership

*Exhibit 5: **Four Core Elements of a Strong Partnership:** Effective partnerships start with relationship building, with longevity, sustainability, compliance, and patient focus at its center.*

Ipsos collaborates with clients to identify the most suitable partners for long-term success. In order to do so, PAGs must find the right healthcare organization to pair with and vice versa. Ipsos established two distinct questions to focus attention on when evaluating future partnerships (Exhibit 6):

1) **Voice**: How impactful is the PAG's reach and breadth to its respective community?

2) **Value**: How aligned are the partnering organizations' strategic imperatives for potential collaboration?

Voice
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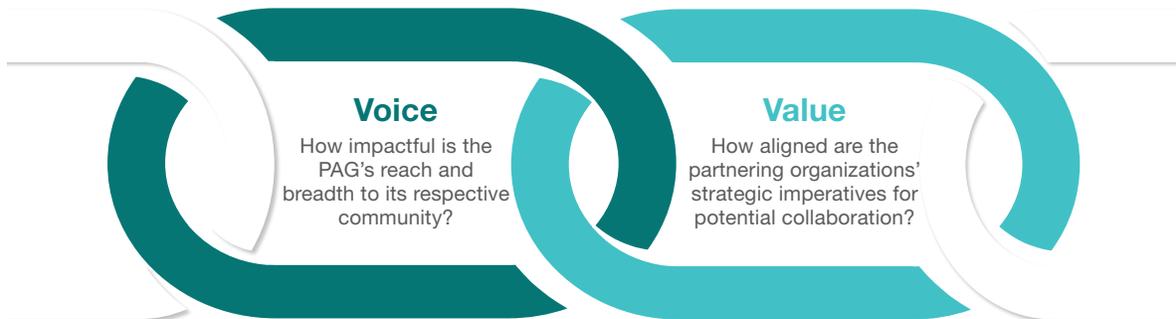
Exhibit 6: **Key Questions When Evaluating Partnerships:** *Consistent and distinct questions are asked when assessing PAGs for potential partnerships across Ipsos' Systematic Framework.*

Ipsos' comprehensive framework answers these essential questions. This approach assesses and ranks PAGs and other potentially influential patient organizations to map their **'Voice'** and **'Value'** (Exhibit 7). Ipsos conducts a holistic analysis of all organizations in the therapeutic area of interest to identify their most suitable partners. Ipsos first evaluates and connects individual components/criteria to a collaboratively developed prioritization framework to comprehensively identify patient organizations most appropriate for partnership.
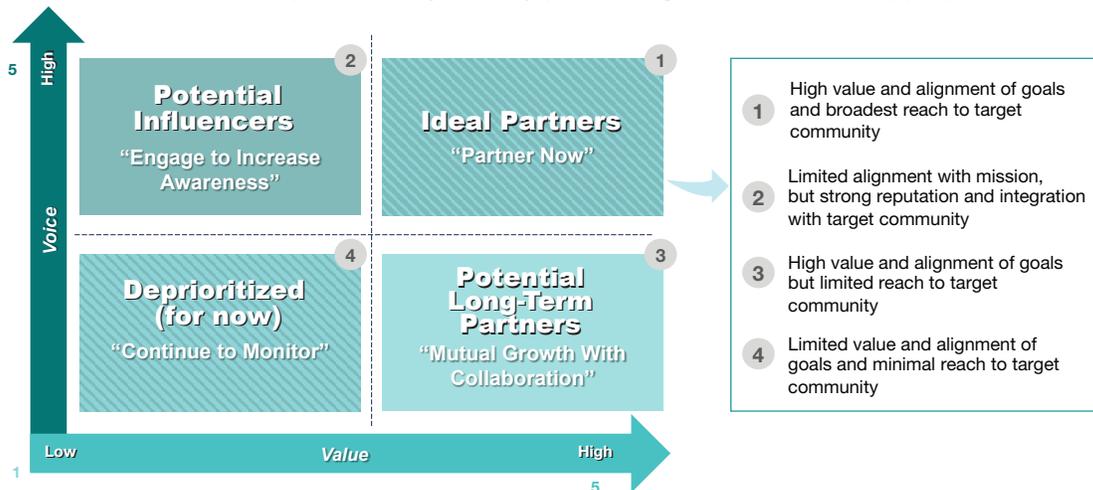
Voice (vertical axis: Low → High, 1 → 5)
Value (horizontal axis: Low → High, 1 → 5)

2 — Potential Influencers "Engage to Increase Awareness"
1 — Ideal Partners "Partner Now"
4 — Deprioritized (for now) "Continue to Monitor"
3 — Potential Long-Term Partners "Mutual Growth With Collaboration"

1. High value and alignment of goals and broadest reach to target community
2. Limited alignment with mission, but strong reputation and integration with target community
3. High value and alignment of goals but limited reach to target community
4. Limited value and alignment of goals and minimal reach to target community

Exhibit 7: **Ipsos Framework for Partnership Prioritization:** *The goal is to find organizations most suitable for the partnership while also identifying long-term partners and other influential stakeholders in the landscape.*
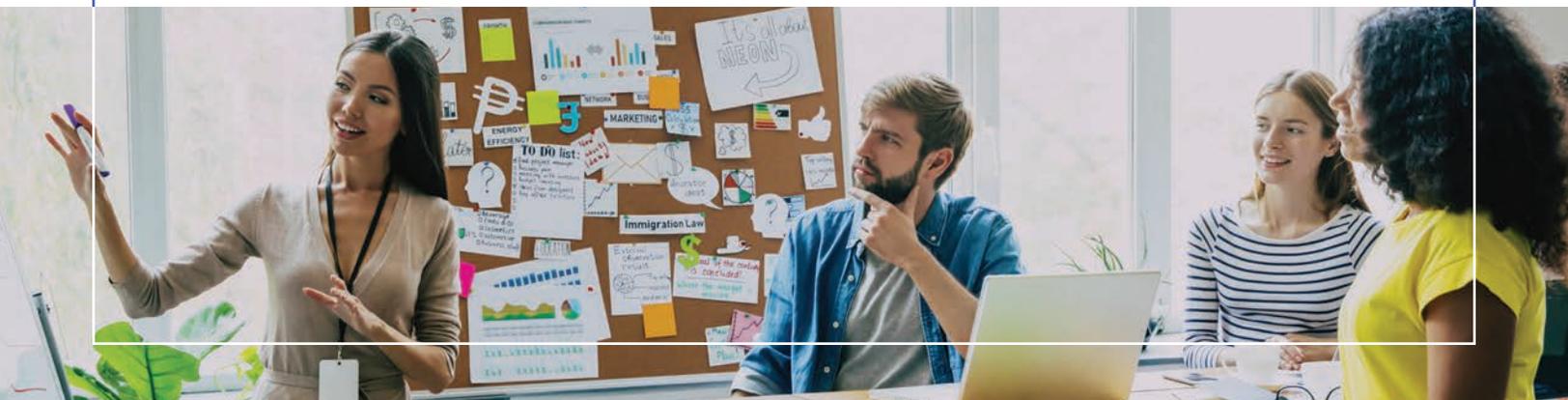
The Ipsos framework utilizes **'Voice'** and **'Value'** criteria to uncover the 'who and what' and the 'why and how,' respectively (Exhibit 8). The **'Voice'** criteria will uncover the impression, impact, and breadth of a PAG in its respective community. The **'Value'** criteria allow healthcare organizations to discover potential strong collaborations by revealing how strategies align across objectives and missions.

Voice:
Each organization's reach & breadth within the community that defines the potential impression their group makes

WHO? Who is the key audience?

WHAT? What resources does the organization provide to their community?

Value:
The organization's impact regarding strategic alignment and collaboration potential

WHY? Why is the organization a valuable partner?

HOW? How can this organization impact our efforts to be more patient-centric?

*Exhibit 8: **Voice and Value Answer the Basic Questions:** Determining the best partnership requires a fundamental look at each potential PAG's target audience, key activities, and overall vision.*

Ipsos then identifies all suitable partners and assesses each in accordance with the framework. The framework considers the **'Voice,'** or its capabilities and reach, and **'Value,'** or the impact it has on the partnering organization. Ipsos evaluates each PAG on multiple dimensions scored and weighted to specific priorities of the partnering organization, which defines the potential success of each individual partnership (Exhibit 9).

Each org's reach & breadth within the community that defines the potential impression their group makes

Target Stakeholder Group
Key stakeholder focus

Geographic Footprint
PAG geographic lens

Therapeutic Area Footprint
Specificity around disease area

Digital Footprint
High engagement across digital platforms

The impact of the organization regarding strategic alignment and collaboration potential

Scope and Scale of Activities
Activities focus on similar organizational objectives

Vision and Mission
High alignment with organizational goals

Willingness to Collaborate
Open to partnering with organizations

Quality of Brand Recognition
Established presence of organization

Degree of Investment Required
Suitable investment (both monetary and effort) required for partnership
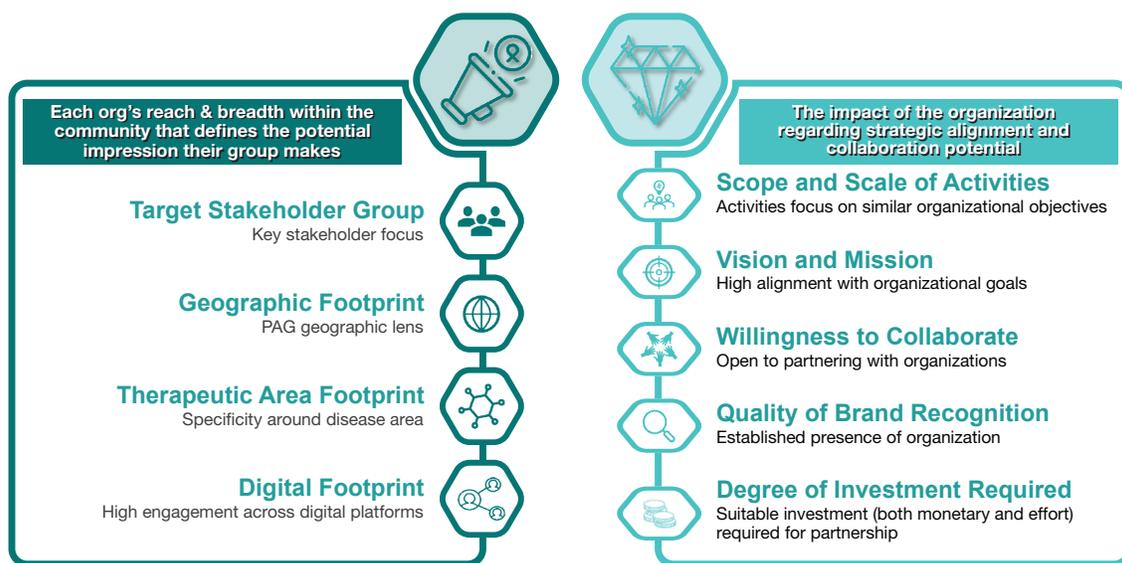
*Exhibit 9: **Voice and Value Support Alignment of Partnerships:** Voice and Value are incorporated into multiple categories that define the success of a partnership and create a unique framework.*

Ipsos works with all stakeholders to prioritize their partnering goals. After refining and adjusting criteria and weighting, Ipsos applies a specific scoring criterion to uncover aligned PAGs. This unique scoring leads to the development of a prioritization matrix (Exhibit 10). This approach provides an opportunity to quickly assess potential partnerships in a standardized, consistent, and comprehensive manner.
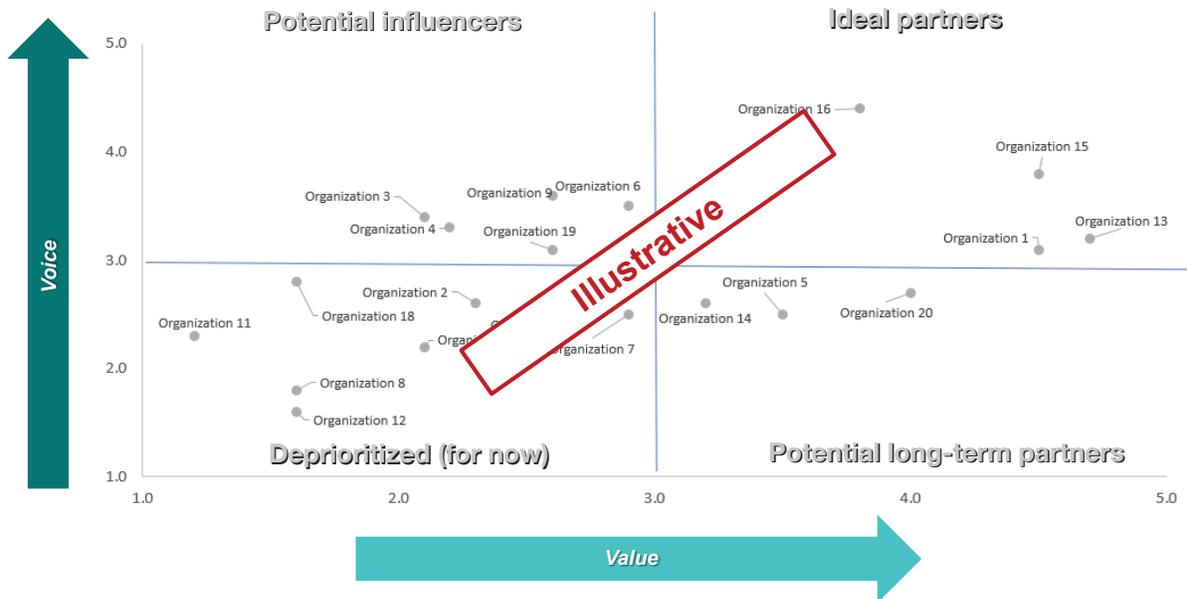

*Exhibit 10: **Prioritization Matrix:** Based on the framework, a set of ideal partners and potential influencers is identified.*

There are multiple opportunities for healthcare organizations to partner with PAGs, which is why Ipsos has created this strategic approach to evaluate and align patient organizations. By assessing PAGs across our **'Voice'** and **'Value'** axes, Ipsos is able to prioritize available partnership opportunities. This analytic assessment of partnerships takes an objective approach to identifying strategic partners in patient communities. The flexibility of the tool supports utilization over the long term as priorities of partnering organizations change with time. The ability to customize the weighting allows organizations to easily adjust how criteria are categorized, revealing newly aligned potential partners over time.

How to Activate

Once the client has identified whom to partner with, Ipsos will look at how they could partner. PAGs are not generally looking for one-off donations to support their mission; they are looking for mutual collaboration and growth with healthcare organizations. Based on the evaluation of each organization, Ipsos develops customized partnership goals to promote patient-centric activities within the community. The intent of the comprehensive partnership framework (Exhibit 11) is to align stakeholder needs with advocacy activities related to the unique opportunities each group offers.
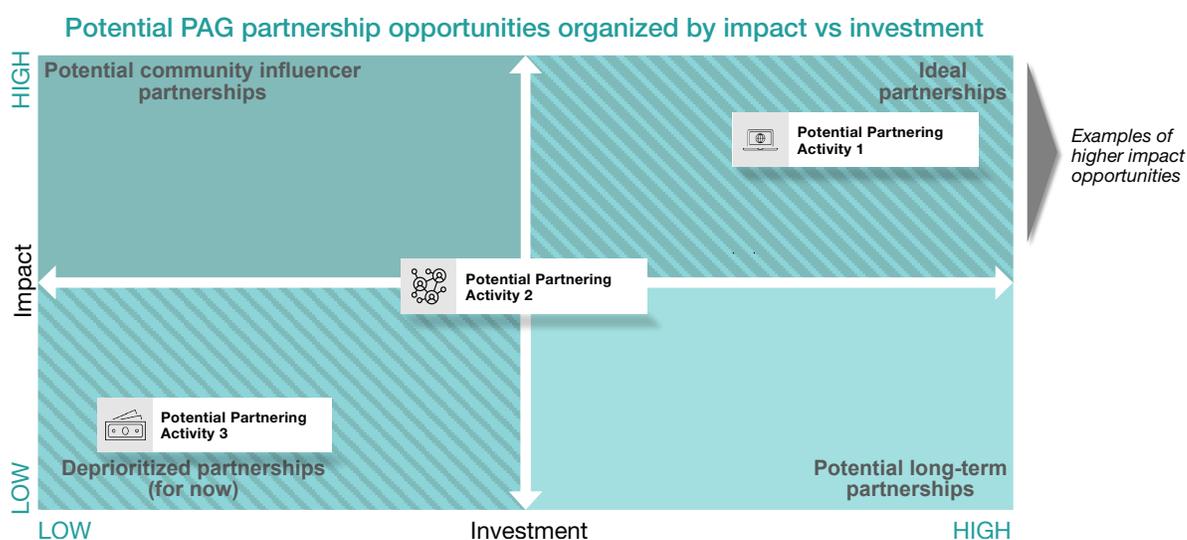
Potential PAG partnership opportunities organized by impact vs investment

Exhibit 11: **Potential Opportunities for Partnership:** *Evaluating individual components of each strategy can tease apart the most valuable opportunities.*

At Ipsos, we believe all healthcare stakeholders need to take this long-term, sustainable approach to partnerships. Doing so will improve patient-centric focus and create change in the industry. Ipsos' thorough framework identifies the opportunities for bi-directional partnerships between PAGs and healthcare organizations, demonstrating a transparent commitment to patient-centric activities.

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At Ipsos Healthcare Advisory, we go beyond the data to help our clients make the best strategic decisions using detailed analytics and thoughtful insights. We understand knowledge is at the root of all good decision making. Our expert practitioners can help you and your team build your brand and deliver value across every product's lifecycle—from commercial strategy to launch excellence to market access, and commercial analytics. We are complex problem-solvers, true collaborators, visionary strategists, and solution-generators who bring the power of Ipsos to every project.

To learn more about how your organization can partner with Patient Advocacy Groups, please contact:

Alexis Anderson, Principal, Ipsos Healthcare Advisory
Alexis.Anderson@ipsos.com

About the Authors

Alexis Anderson, MPH

Alexis is a Principal at Ipsos Healthcare Advisory whose work focuses on the intersection between digital transformation & patient-centricity. She helps clients to better understand patients' needs and harness insights to meaningfully transform product development & design better digital tools. She fully believes that when organizations start with a 'patient-first' approach, they become better equipped to bring the right solutions to the right people—all in a faster and more efficient manner. She has also co-authored several other thought leadership papers focused on improving the uptake and use of diabetes digital technologies and the importance of addressing inequities in healthcare technologies (techquity).

Adam Kaufman, MBA

Adam is a Consultant at Ipsos Healthcare Advisory who partners with biopharma, digital health, and other healthcare organizations to solve complex challenges and inform them about emerging trends and opportunities. His recent focus has been supporting clients with evaluating various early commercial opportunities, as well as supporting product development through launch.

Rebecca Cohen

Rebecca is an Associate Consultant at Ipsos Healthcare Advisory who is passionate about the use of digital technologies and the ways in which they can support patients across the healthcare system. She has experience partnering with stakeholders from across the industry—ranging from pharmaceutical, MedTech, and digital innovators to help them develop and deploy the best digital strategies for their patient populations.

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