

The 20Sense Report

Spotlight on the Canadian Specialty Pharmaceutical Market

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The Hidden Value of Patient Support Programs

If you're playing in the specialty medicines field, a patient support program (PSP) is the price of admission. But it can be so much more than that. **The right PSP—matched to the company and the product—can yield big wins to all stakeholders along the specialty medicines value chain.**

In the current model, industry often has PSPs managed by specialty service providers, who assume responsibility for coordinating reimbursement with insurers, supporting patients on the product, and liaising with doctors and patients. As part of this system, manufacturers often give out millions of dollars of free products to patients waiting for coverage. This compassionate service fills an important gap in the healthcare system but, if imperfectly managed, can lead to significant financial losses and missed opportunities. For manufacturers, it is important to remember that, in the eyes of doctors and patients, these programs are an extension of your company, representing you to these important stakeholders.

What if the manufacturer and specialty service provider worked as true partners, rather than in separate spheres? What if manufacturers came to see patient support programs as an engine of value, rather than a necessary but costly item on their balance sheet?

Here's a realistic scenario: a pharma company and specialty service provider work together to design a program that puts both patient and institutional needs at the forefront. Patients get access to the product they need more quickly and receive the support services they value the most. The company achieves stronger sales. The program enables the collection of richer, real-time data to create dashboards and deliver product insights relative to physicians, patients, payers and lines-of-therapy — data that can help improve patient outcomes. Payers can use this data to make more equitable decisions about coverage. **Everybody wins.**



A Levelled Playing Field

20Sense has been observing and analyzing patient support programs since the early days of specialty medicines. While considerable care goes into all programs, their outcomes vary widely. We have seen some truly great programs—and programs with untapped potential. We have also seen programs that look great on paper, but are not optimally matched to a particular product.

To encapsulate our observations, we have created a diagram depicting four levels of PSPs. We'll describe Level 1 in this issue and zero in on the other levels in subsequent issues. Our hope is that the descriptions will help manufacturers identify “where they're at” and, if applicable, explore opportunities to aim higher.

Specialty Programs Driving Innovation

For Manufacturers, Payers, Prescribers and Patients



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Level 1, or “Basic Program,” is where many programs initially land, especially for manufacturers new to the space. They may select a vendor based on hearsay or competitor experience, without hard evidence to guide their choice. They may reach for an “off-the-shelf” program that doesn’t suit their product, patient population, and corporate values. Whether externally or internally run, the program may be set up with a tactical focus on cost containment at the expense of patient experience, data capture and reimbursement effectiveness. The result? A program dragged down by poor service and missed opportunities. This leaves manufacturers with the costly proposition of switching programs or providers downstream. In the next issue, we’ll take a closer look at Level 2.



Staying Ahead in a Noisy Market

If you think the specialty medicines market is crowded now, just wait a few years. By 2020, specialty drug-spend is expected to reach 50% of the total pharmaceutical market¹—up from 30% in 2016.² And just a decade ago, the figure sat at 13%.² If you're serious about building a stand-out PSP, here are some pitfalls to consider—and avoid:

1. **Don't rely on word-of-mouth when picking a specialty service provider.** The program used by your competitor may not be right for you. Same goes for that bare-bones, discounted program you've heard about. Educating yourself on this market and operating a full RFP process may take time, but will pay rich dividends for years to come.
2. **Don't take provider claims at face value.** A claim of “high adherence metrics” may sound impressive, but means nothing without hard numbers to back it up.
3. **Don't give up all control of your program.** After patient access, what is your top priority? Is it data? Supply chain efficiencies? Capturing physician feedback? Clarifying and communicating your needs will multiply the value of your program.
4. **Don't lock yourself in a rigid program.** Take feedback from the best data sources at your disposal—patients and doctors—and use it to fine-tune your program and change course if needed.



Want to get more out of your PSP? Let's start a conversation

The bulk of evidence suggests that PSPs have a positive impact on clinical outcomes and adherence³—but only if done right. We invite you to get in touch with us to learn more about:

- Selecting and building your PSP
- Gathering data that will drive patient satisfaction and retention
- Containing costs through smarter and more efficient program processes
- Enhancing your offerings to meet industry's evolving needs

What We're Reading

We find that the following articles provide great insight into the issues affecting PSPs and the specialty pharmaceuticals market. Follow us on [LinkedIn](#) where we're sharing our thoughts on these topics and many more.

[Innovative Medicines Canada 2016 Code of Ethical Practices: Page 31 Patient Support Programs and Medical Practice Activities](#)

[The Pros and Cons of Patient Support Programs](#)

[AbbVie Presents Real-World Data Evaluating the Relationship between Participation in a Patient Support Program and Outcomes in Patients with Moderate to Severe Rheumatoid Arthritis](#)

[Patient Assistance Program Primer: The private benefits plan sponsor's guide to the patient assistance program](#)

References

- 1 Sun Life: Specialty drugs trends, challenges and solutions (2015).
- 2 Express scripts Canada drug trend report (2016).
- 3 Ganguli A et al. Patient Prefer Adherence 2016;10:711.

Upcoming Issues

In the next issue of *The 20Sense Report*, we'll take a deeper dive into:

- Patient Support Programs at Level 2: Optimized Programs
- Real-world evidence and real-world data
- Biologics, biosimilars, and biobetters

Is there an issue you'd like us to address? Do you have a question you'd like us to answer? We welcome your suggestions for topics you'd like *The 20Sense Report* to cover.



20Sense helps pharmaceutical manufacturers and specialty service providers more effectively enter and compete in Canada's complex specialty pharmaceuticals market by optimizing data, insights and programs that deliver better outcomes for patients and value for payers.

Are you looking to make better sense of the specialty pharmaceuticals market? Contact us at info@20Sense.ca | www.20Sense.ca | [in](#)