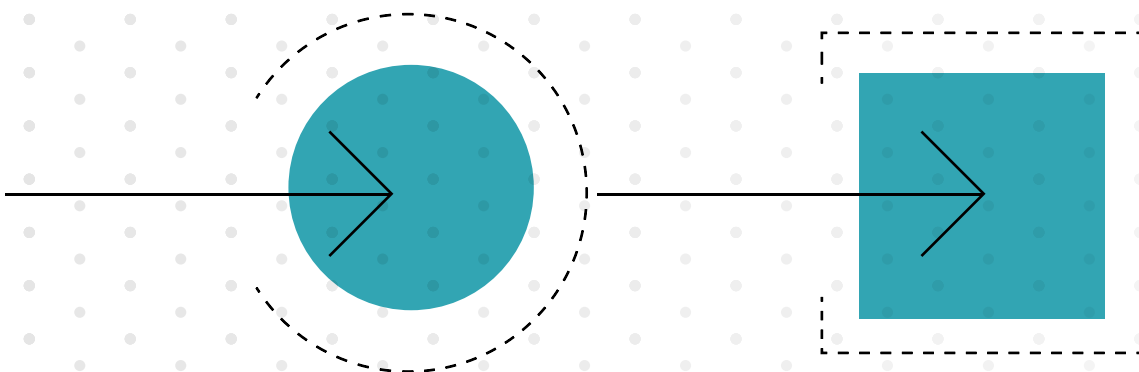# PHIL

Modernize the Patient Access Experience.
Transform Your Pharmaceutical Brand.

Executive Summary

Consumer expectations continue to evolve in the world of pharma. The pandemic unleashed disruption and innovation in healthcare. Beyond the experience consumers were already getting from retail and banking, they now expect that and more from healthcare. In addition to effective treatments, they want on-demand convenience, personalization, and a frictionless experience.

Despite evolving demand, the pharmaceutical industry overall is yet to deliver a truly patient-centered experience. As manufacturers face stiffer competition and substantial hurdles to patient access, they cannot afford to miss this essential piece of the puzzle when it comes to patient support services.

It's time for pharma to connect the dots to proactively shape the patient experience to improve therapy outcomes. Implementing patient access and companion support programs that respond to consumer pain points, generate economic value, and drive behavior change will improve clinical outcomes and deliver the financial rewards of market differentiation.

Contents

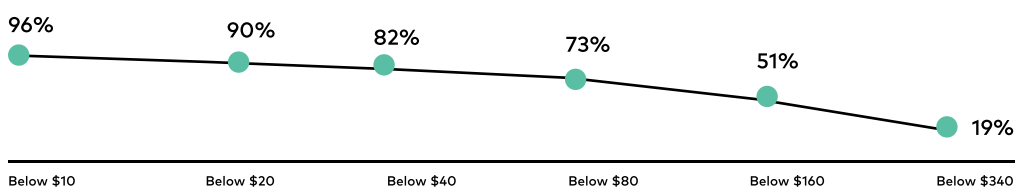# Understanding The Modern Healthcare Consumer

Out-of-pocket pain

Healthcare affordability continues to be a primary concern for patients, which directly impacts access and adherence to therapy.

01. 1 out of 2 consumers find it very or somewhat difficult to afford their healthcare costs[1]

02. 2 out of 3 personal bankruptcies in the US are due to medical bills.[2]

03. Out-of-pocket costs for brand name medications increased by 15% for over half of patients with drug deductibles or coinsurance from 2015 to 2018[3]

04. 1 out of 4 adults have not taken a medication as prescribed due to cost[1]

PhilRx Channel Insights

Phil sees an **inverse linear relationship between patient out of pocket copay costs and payment conversion** across its patient access programs indicating that as patients are required to pay more out of pocket, the rate of prescription abandonment increases.. This is often a source of frustration for manufacturers who have limited recourse to address this issue. **Phil provides insights to help manufacturers balance pull through with sustainable financial support.**

Payment Conversion Rates at Varying Copay Amounts *

Below $10	Below $20	Below $40	Below $80	Below $160	Below $340
96%	90%	82%	73%	51%	19%

(Phil Program Data (2022)

Understanding The Modern Healthcare Consumer:
The Evolution Of Consumerism

With more skin in the game, patients-turned-consumers want to engage more in all aspects of medical decision-making – including their prescribed therapies. In 2022, it's not uncommon for patients to ask for specific therapies that they've researched. **Yet, well before the COVID-19 pandemic, healthcare consumers desired to interact with pharmaceutical companies with the same ease, convenience, and level of personalization they experienced in other industries, such as retail, travel, banking, and hospitality.**
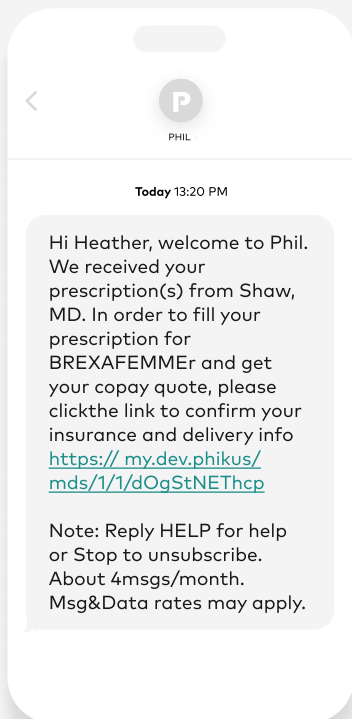
The pandemic significantly impacted pharmaceutical and life sciences company operations, from creating supply chain disruptions to impacting commercial operations as healthcare entities went virtual first. derailing drug development for non-COVID diseases to create supply chain disruptions. As consumers struggled to access prescribed therapies safely and reliably, COVID-19 further elevated their expectations for seamless digital healthcare experiences. Together, these challenges & expectations necessitated a rapid shift to digital tools. While the pharma industry had been notoriously slow to adopt digital solutions, many in the industry estimate the pandemic accelerated digital transformation by 5 to 7 years.

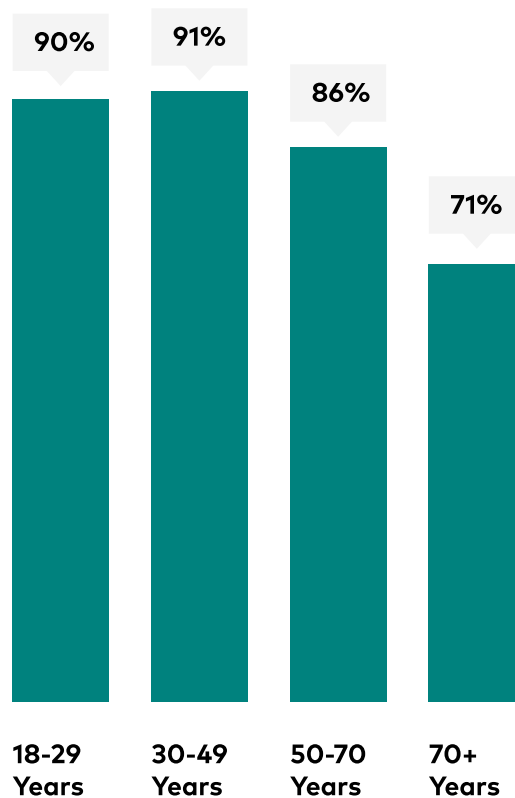| Pre-COVID consumer behavior and expectations	Pre-COVID consumer behavior and expectations
• **19%** - additional amount consumers were willing to pay for a "no wait time" prescription[4]	• **44%** used new devices or apps to help manage conditions remotely during COVID-19[8]
• **52%** - additional amount affluent baby boomers and Gen Xers were willing to pay for a "no wait time" prescription[4]	• **60%** - want to use technology more for communicating with healthcare providers and managing their conditions[8]
• **29%** sought information about their medications online, which often influenced their choice of treatment[4]	• **80%** prefer to use digital channels to communicate with HCPs and brands[9]
• **23%** would be motivated to take a more active role in managing their health if they had reliable and secure digital tools to help them to understand their health[5]	• **36%** expect online communications to match the in-person healthcare experience[9]

Understanding The Modern Healthcare Consumer

Recognizing the varying levels of technology literacy across populations, yet near universal adoption of smartphones **Phil leverages SMS to enable real-time enrollment of patients in its access program to realize exponentially higher enrollment across ages than telephonic based access programs:**

No App Download Required

PHIL

Today 13:20 PM

Hi Heather, welcome to Phil. We received your prescription(s) from Shaw, MD. In order to fill your prescription for BREXAFEMMEr and get your copay quote, please clickthe link to confirm your insurance and delivery info https:// my.dev.phikus/ mds/1/1/dOgStNEThcp

Note: Reply HELP for help or Stop to unsubscribe. About 4msgs/month. Msg&Data rates may apply.

PhilRx Platform Enrollment by Age

Age	Enrollment
18-29 Years	90%
30-49 Years	91%
50-70 Years	86%
70+ Years	71%

Understanding The Modern Healthcare Conusmer:
The Next Generation

Today's healthcare consumers expect a frictionless healthcare experience driven by digitally enabled tools that provide:

- Personalized information
- Active participation in care and treatment
- Real-time feedback on behaviors and health outcomes
- Convenience and on-demand services
- Options for how care is delivered and paid for

Pharma's opportunity to create more value

This new era of healthcare consumerism opens the door for the life sciences sector to build end-to-end partnerships with patients that create value through better clinical and financial outcomes. Digital technologies can be leveraged to:

- **Empower patients** to engage in their health the way they expect
- **Support a patient-centered experience** with more predictive and personalized care
- **Reduce out-of-pocket costs** by facilitating access to payer coverage approvals
- **Accelerate access and boost efficiency** with automated workflows
- **Improve adherence** to prescribed therapies with digital tools that make it easier to overcome barriers
- **Gain deeper insights** from patients using specific therapies
- **Demonstrate value** to payers and inform outcomes-based pricing
- **Enhance and meet utilization management requirements** for health plans
- **Differentiate brands** in increasingly competitive therapeutic categories

The Current Patient Access And Support Experience

Offering patient access and support services are the most tangible ways for life sciences companies to connect and engage with patients. Accordingly, there has been significant investment to address the needs of patients across their prescription journey, particularly for specialty and specialty-lite therapies. Despite the investments, there has been poor utilization.

- **$5B** – How much pharma companies spend annually on patient support programs[10]
- **3%** - The percentage of eligible patients who are using support programs[10]

Why is pharma missing the mark?

01. **Simplifying The HCP & Patient Access Journey**
- Nearly 50% of biopharma marketing execs say they lack a good understanding of what customers need or want[11]
- Almost 50% of patients say pharma companies don't understand what they need to manage their health[11]

02. **They're Not Getting The Word Out**
- 59% of patients have little to no knowledge of available programs[11]

03. **They're Not Providing A Patient-Centered Experience**
- They're not providing a patient-centered experience
- Only 35% of patient groups say the pharma industry is "excellent" or "good" at putting patients first[11]

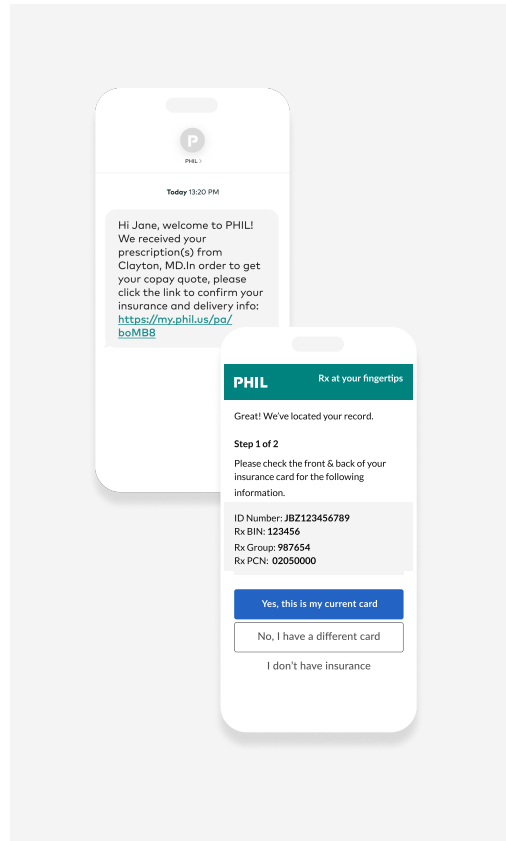**04.** **They're Risk Averse**
- "New technology often faces strong organizational barriers, such as mind-sets that resist IT change and conservative cultures that base decisions on perceived risks." – McKinsey & Company[12]

**05.** **Data Silos Still Exist**
- Merging different data silos from digital health partnerships or acquisitions remains a challenge for many life sciences companies[13], which inhibits the ability to accurately capture and act on patient information

The Current Patient Access And Support Experience

Many access programs require an additional task of patients requiring them to navigate to a website or answer a call to opt in. Phil on the other hand enrolls patients in access and support via a text message when an HCP sends a prescription to the PhilRx channel combining program enrollment and prescription access. This seamless approach paired configurable workflows to meet brand specific needs results in exponentially higher access enrollment than industry benchmarks.

PhilRx Enrollment by Coverage cohort

Created Week
- Insured - Enrollment Rate
- Uninsured/Unknown - Enrollment Rate
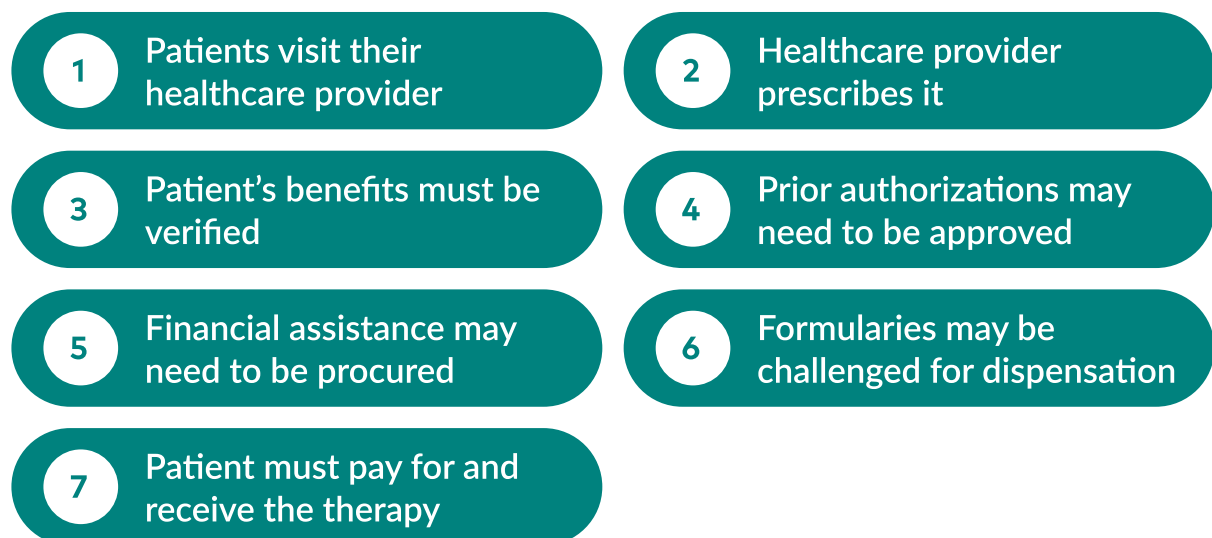- Aggregate Enrollment Rate
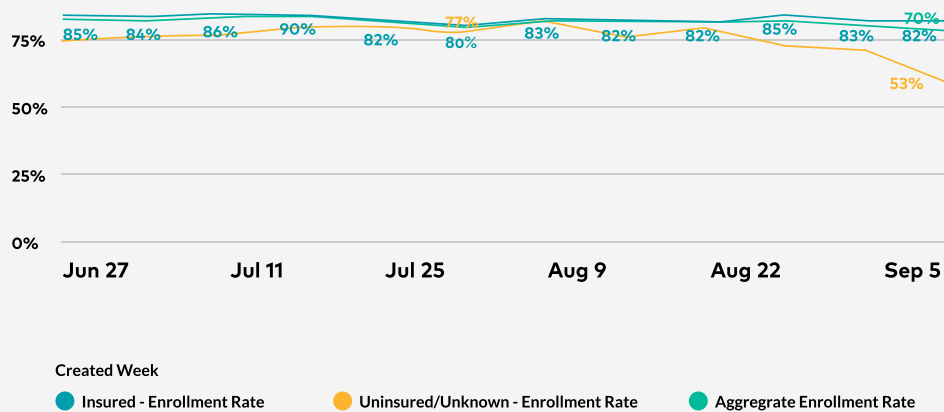
Is A Patient Access And Support Program Worth The Investment?

Improving patient outcomes is a shared objective of life science companies and healthcare consumers. However, this goal is challenging to achieve when patients struggle to navigate the complexities of healthcare. Now is the time for pharmaceutical and life sciences companies to rethink the arduous patient journey in an era where digital-first consumerism is the norm. The pharmaceutical sector can benefit from patient access and support programs that address consumer pain points, generate economic value, and drive behavioral change by improving clinical outcomes and reaping the financial rewards of market differentiation.[14]

78% of health executives believe that the stakes for experience innovation have never been higher and getting it "right" will require new ways of innovating with ecosystem partners and third-party organizations.[15]

The patient's prescription journey

Before a patient can begin a prescribed medication, several steps must happen:

1. Patients visit their healthcare provider

2. Healthcare provider prescribes it

3. Patient's benefits must be verified

4. Prior authorizations may need to be approved

5. Financial assistance may need to be procured

6. Formularies may be challenged for dispensation

7. Patient must pay for and receive the therapy

Each of the touchpoints along the patient's journey can influence the likelihood of prescription abandonment, time to therapy initiation, and adherence to therapy. With more than **$300B in estimated treatment value lost due to medication non-adherence,** investing in services to help patients comply with their prescribed treatment is well worth the investment.[16]

Patient services can be crucial in reducing the patient's disease burden and improving their experience. For companies that market a specialty therapy, the dilemma should not be whether to offer these services but rather deciding on the right mix of services and the right channels to deliver them.

The Case For A Modernizing Your Patient Services Model

The growth of specialty pharmaceuticals sparked the creation and evolution of patient support programs – often referred to as hub services. While initially, their focus was to ease the provider's prescription process, they evolved to a more holistic approach that allows manufacturers to connect with patients throughout the prescription delivery process. A comprehensive program typically includes financial, clinical, engagement, education, and access to therapy services. Service offerings may include benefits investigation and verification, prior authorizations (PAs), copay support, financial assistance, drug delivery and administration, and patient education.

A wealth of evidence shows that patient support services positively impact adherence, clinical outcomes, and satisfaction while lowering overall healthcare costs;[18,19,20,21] however, they can only deliver value if patients actually use them.

Traditional hub programs, which employ a call-center approach, tend to be product focused and misaligned with next-generation consumers' expectations.

Multiple potential gaps exist in a patient's prescription journey from diagnosis to treatment initiation and follow-up. Identifying and addressing these gaps helps streamline the journey and ensures patients receive the right therapy at the right time. The PhilRx Platform streamlines the prescription access journey by eliminating pain points to make prescription access a seamless experience for patients, HCPs, and pharmaceutical brands.

For HCPs & Patients	For Pharma Brands
• HCP e-prescribes to PhilRx within existing workflows	• Implement a customized workflow to facilitate Rx access
• PhilRx completes the benefit check and facilitates streamlined prior authorization	• Differentiate dispense programs by payer prior authorization behavior
• Patient enrolls in PhilRx on smartphone (no app required)	• Patient enrolls in Phil on smartphone (no app required)
• PhilRx delivers prescription to patients home or to a local pharmacy	• Equip field teams to close HCP prior authorization submission gaps

The Case For A Modernizing Your Patient Services Model: 10 Things To Expect

A modern approach integrates consumer-centric digital capabilities to elevate the patient experience, which motivates activation and engagement. Strategic data insights along the way transform the patient journey. By connecting with healthcare consumers on their terms, you should expect a next-generation support program to:

1 Offer a frictionless, consumer-centric digital experience similar to other industries

2 Meet patients where they are with on-demand access to mobile and portal applications and the ability to choose how they receive their prescriptions (delivery vs. preferred pharmacy)

3 Reduce time to therapy initiation by facilitating and automating the enrollment, benefits verification, and prior authorization processes

4 Ease prescription affordability concerns by minimizing out-of-pocket costs by connecting patients with copay cards or patient assistance programs

5 Empower patients by helping them better manage their disease and treatment with optimized engagement powered by analytics

6 Increase therapy access by providing a large, national dispense network to ensure coverage

7 Boost medication adherence with automated medication and refill management

8 Help patients receive care in a more convenient setting with virtual care options, such as telemedicine

9 Deliver data-driven insights to proactively enhance the patient experience and improve program results

10 Ensure connectivity to stakeholders across the prescription journey and facilitate patient service team collaboration by eliminating data silos with end-to-end integration capabilities

Customer Success Snapshot: Women's Health Brand
A Patient Experience Transformation
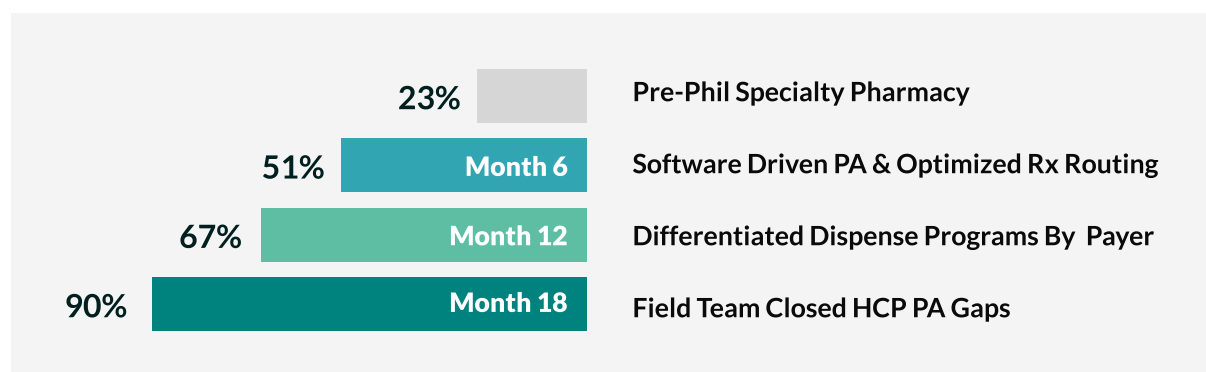
Why is pharma missing the mark?

Prior to Phil, this client had partnered with a specialty pharmacy to enroll patients in a patient support program as part of the commercialization strategy to launch its flagship product. Despite having excellent formulary placement among national and local payers, the brand's growth stalled due to the antiquated patient engagement approach. The program used automated phone calls to engage patients, and the enrollment process was lengthy, which deterred most patients from signing up. One-year post-launch, the enrollment rate was only 2% of eligible patients, negatively impacting the number of prior authorization approvals.

The Solution

The organization's commercialization team partnered with Phil to modernize the patient support program. The customized solution integrated seamless digital enrollment, "one-click" PA submissions, optimized pharmacy routing, data-driven differentiated dispense experiences, ongoing adherence support, and real-time actionable insights. Within 18 months, the Phil platform experience completely transformed the brand's trajectory.

Key Results

- Increased enrollment rate from 10% to 90%
- Boosted monthly new prescriptions by 36%
- Doubled successful first fills and increased total fills/patient by 400%
- Achieved a 4x lift in the percentage of dispenses with formulary coverage
- Monthly net sales grew from $11k to $1.2M

23%		Pre-Phil Specialty Pharmacy
51%	Month 6	Software Driven PA & Optimized Rx Routing
67%	Month 12	Differentiated Dispense Programs By Payer
90%	Month 18	Field Team Closed HCP PA Gaps

The Case For A Modernizing Your Patient Services Model

Pharmaceutical companies that want to deliver patient-centered support services can start by:

- Auditing the current patient support services approach to identify gaps and evaluate whether it is delivering a next generation consumer experience.

- Refining service offerings by phasing out antiquated engagement models and adopting a digital-first approach that personalizes patient connections.

- Seeking out a commercialization partner that can operationalize a data-driven patient journey, provide seamless integration of communication channels, and optimize processes based on strategic insights.

- Developing key performance indicators (KPIs) to measure performance and enable proactive actions to improve outcomes.

How Phil can help

Phil partners with life sciences and pharmaceutical companies to support the commercialization of their brands in a complex and ever-changing marketplace. Our next-generation patient access and support platform improves clinical and financial outcomes by enabling a frictionless, patient-centered experience.

Contact us today to start engaging more patients in your patient access and support program.

Transformation Outcomes		Phil Patient Access Platform
90%	Patient Enrollment	● Seamless HCP & Patient Experience
2x	Increase In Covered Dispenses	● Software Driven Prior Authorization
75%+	PA Submission Rate	● Optimized Routing Via National Dispense Network
5x	Improvement In Rx Refill Adherence	● Wholesale Distribution
6x	Net Sales Growth	● Real-Time Data & Actionable Insights

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