

The “Digital” Patient: Patient Platforms

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Patient Experience

- Inconsistent
- Antiquated
- Brand-centric
- Where's the patient?



Scope of Services

- Engagement vs Services
- Onboarding with logistics, financial, reimbursement navigation
- Adherence
- Education
- Life assistance



Landscape

- Programs are opportunistic and siloed
- Multiple platforms and partners... even though consistent scope
- Mostly happening in mature markets
- Emerging markets are mostly one-off apps



Patient Data

- Patient data storage laws vary by market
- Patient data capture is mostly outsourced with no data access
- Data insight opportunities are lost



Real World Opportunity

- Need for a patient data storage strategy
- Flexible solutions that meet market requirements
- Medical Device Apps
- Integrate with RWE
- Prove outcomes



Platform Opportunities

- Standard platform with considerations for external service provider integrations
- Cross-leverage commercial experience in Digital engagement
- Accelerated development platforms for patient apps



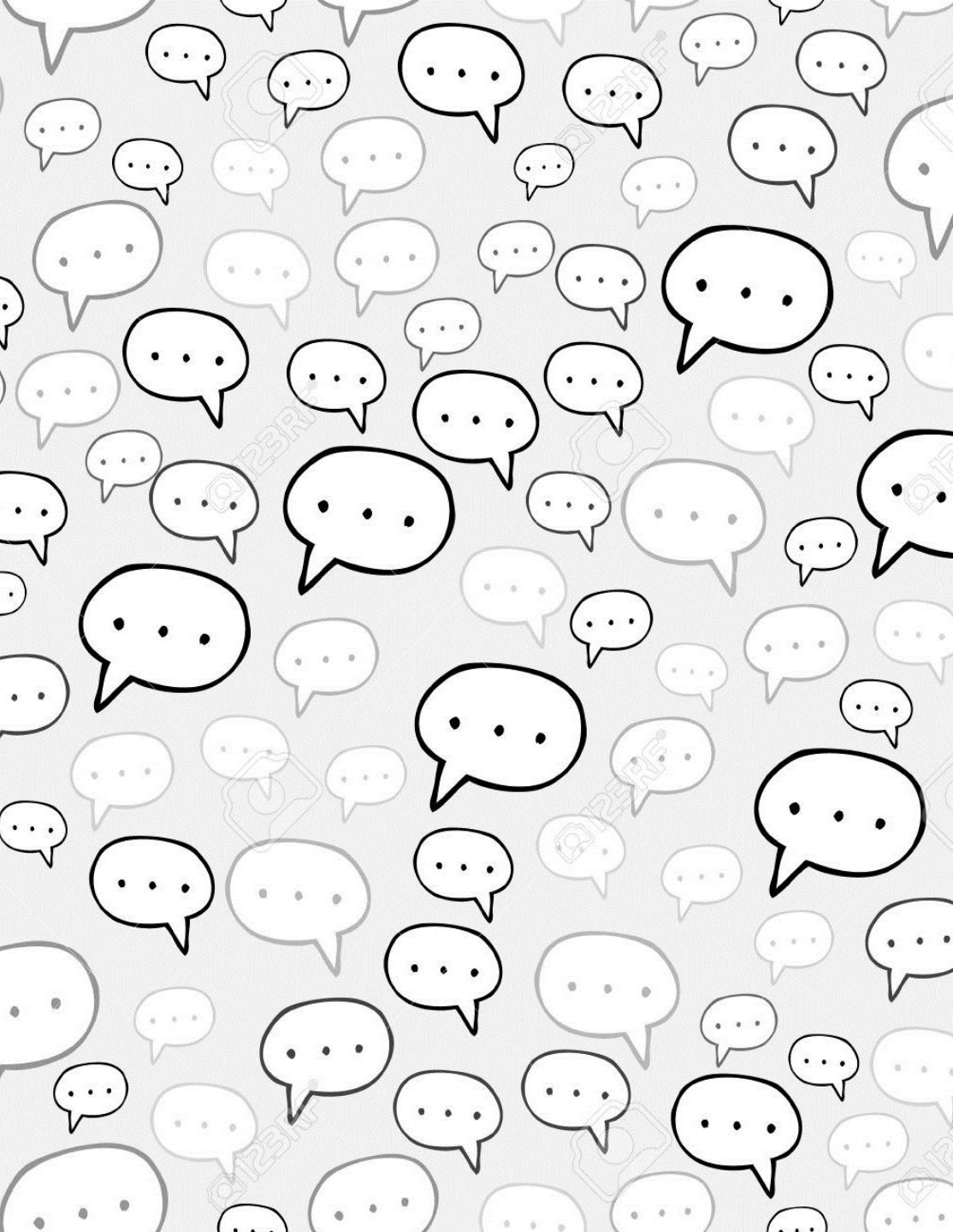
Big Players

- Google Health
- Amazon AWS
- Microsoft Azure, Cortana, and HoloLens
- IBM Watson
- Apple Health kit and Research kit
- SFDC



Future Needs

- Cross-enterprise solutions
- “Co-opetition”
- Full multi-channel
- Patient journeys
- Patients take back their data
- AI and data science
- Blockchain?



Discussion Points

- Current State
- Value of Pt Services
- Co-opetition
- Standard Platform
- Patient Data