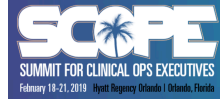


Patient Activation White Paper: Takeaways from Digital Health Conferences 2019



The future potential of digital health is not a question -- rather it is who can execute.

Choosing the right path, and the right partners, will impact the ability to advance a company's vision.

Key members of the 83bar management team had a chance this year to participate in five major digital health conferences: SCOPE - Summit for Clinical Ops Executives, BioPharma eMarketing Summit, DPharm, Clinical Trials Patient Experience Summit, and CNS Summit.

The 83bar team included Bob Baurys, CEO, and members of our Sales, business development, operations, and strategy teams: Amanda Jarrett, Paul Egli, Kate Hermans, Alex Hilderbrand and Mike Zangrilli.

This is a report of our key learnings and implications for patient activation. In short, we felt the key idea from these conferences was "dare to disrupt" -- what got us here won't get us there.

Contents

1. Innovation Trends
2. Execution Readiness
3. Collaborations between Companies and Supplier Partners
4. Obstacles and Cautions in Patient Recruitment
5. Leadership Potential
6. Data-driven Case Study Presented by 83bar

Innovation Trends

Many companies are looking to harness the power of technological innovations to help accelerate the development of medicines and connect patients to potentially life-saving treatments. In our view, there were several categories that represented the ways digital health companies are approaching this challenge.

Use of artificial intelligence and machine learning to more rapidly review electronic health records, clinical data, as well as trial design outcomes to change the way drugs are developed, and the way patients are identified for participation.



Leveraging wearables, digital companions, devices and diagnostics to drive better patient outcomes in both treatment and trial participation. These digital communication tools more effectively target, educate, and track patients, as well as transmit data to their providers to enhance their care plans. Some examples include Pear Therapeutics' reSET & reSET-O offerings, Varian's Noona, Otsuka / Proteus's Abilify MyCite, and multiple uses of AI in oncology to more broadly and rapidly share the clinical findings and results of experimental protocols.

Development of digital therapeutics to treat serious diseases (for further reading on this market, go to: <https://dtxalliance.org/dtx-solutions/>)

Reimagining pharmaceuticals through nanotechnology. While not "new", nanotechnology capabilities are advancing. Nanotechnology engineering can achieve a smaller drug particle size and deliver it in a more targeted manner. This offers the ability to reduce the amount of drug used for the same therapeutic result. In addition, there is another benefit that resonates with both millennials and centennials, and that is the reduction of the overall footprint of the pharma industry on the environment and resources.

Execution Readiness

Most life sciences companies recognize the power and importance of harnessing technology / digital innovation to improve drug development and delivery as part of their competitive sustainability. The degree of enthusiasm and action varies across companies, driven by size, budget, vision, and ability to execute.

There isn't just one pathway. Many larger pharma companies are choosing to partner with (and ultimately have a right to acquire) smaller technology innovators, with the goal of leveraging each other's strengths to go faster. Innovation requires rapid testing and learning, failing fast to move on quickly, an iterative development process that requires agility. Often smaller companies are more nimble, while larger ones have proven development and commercial infrastructure. There are also digital innovators who are choosing to go it alone and are carving out a competitive space based on their technology offering. Their success has been and will be determined by their ability to execute on the vision, and remain capitalized long enough to do so. There are multiple paths to market readiness.

Choosing the right path, and the right partners, will impact the ability to advance each company's vision. The future potential of digital health is not a question -- rather it is who can execute.

Collaboration between Companies and Supplier Partners

Because many of us at 83bar come from the pharma industry, we share the passion to accelerate connectivity of patients and therapies. From our experience, pharma companies have often treated its service providers as “vendors.” Certainly these relationships should be more than transactional. The decision to engage vendors can hinder a company's ability to get the most innovation out of the relationship. Rather, a partner can facilitate advancement with a shared interest in success.

At these conferences, we positioned 83bar as a supplier-partner; one that has an expertise in patient activation and is keen to leverage that expertise to help clients be successful more rapidly. We seek clients who are invested in true partnerships; who value the opportunity to co-create. A meaningful idea exchange leads to unexpected innovation. We challenge the traditional vendor “group-think”, cookie-cutter solutions.

Obstacles and Cautions - Patient Recruitment

Over the course of the year's conferences, we observed a common theme. There are a wide variety of service providers who advertised their ability to accelerate patient recruitment. However, not all of these companies are created equal.

Some touted patient awareness and lead generation, but do not translate to enrollment and randomization. Others promoted having a “database” or being able to “look into an EMR” to find patients, but these only focus on matching conditions, not educating potential candidates through a process.



Without navigating a patient, the journey becomes too convoluted, impersonal, and lengthy. If the patient isn't curated along the way, the process of converting a “lead” into an activated patient is thwarted and ultimately leads to the same poor recruitment performance that has plagued the industry for decades.

At 83bar, we have interacted with nearly one million patient prospects, therefore, we have learned how to overcome this slow journey with speed and personalization. Patients who are identified as potential candidates, prequalified, educated and curated to the right trial, have a much higher likelihood of being randomized.

Leadership Potential

We applaud the sponsors of these conferences who took an active role in bringing together a broad mix of thought leaders in “digital health” - life science companies and their supplier partners, academia, researchers, advocacy groups, government, industry organizations, and more.

“Patient centricity” is being elevated at each stage of the drug development and healthcare delivery process. Patient initiatives that address diversity in trials and access are growing. Companies are appointing executives with titles like “chief digital officer” and “chief innovation officer” to help direct these initiatives. They are attracting talent and investment from across life sciences and from Silicon Valley. Devices and pharmaceuticals are now integrating in one treatment solution. Diagnostics are pairing with devices and/or pharmaceuticals to enhance the use of real-world data in the treatment paradigm. Clinical and commercial teams are co-operating to share “voice of the customer” patient data in aggregate to accelerate the commercialization process of bringing the right medicines to the right patients.



Case Study and Data Presented by 83bar

Patient activation and personalization -- at scale -- is possible in both clinical trials and commercial acceleration.

Across several conferences this year, Kate Hermans represented 83bar by presenting a data-driven case study on the power of digital patient activation in clinical trials.

In the midst of every single clinical trial are individuals – people who are looking for that customer experience. They don’t want to be a number or a subject, but instead what to be an active participant in the process; they want a “personal relationship”. If we were able to actually deliver that confident engagement, that memorable customer experience for each and every participant in our clinical trials, wouldn't we want to do that? Wouldn't we want them to have that kind of experience? Across the conferences we attended, the resounding answer was YES.

In order to do that at the size of the clinical trials that we have, we need to think about the concept of personalization at scale. In the United States, 97% of patients don't know about clinical trials; they've never participated in one; they don't know what to expect. What are they looking for from us?

In a study released this fall by DT Associates and Carenity, the number one thing patients expect from pharma is to be “treated personally”.

This customer expectation of personalization has been shaped by companies like Amazon, Google, and others. Today, we can request products, and they arrive rapidly and customized; we don't have to wait and we don't have to leave our home / work to get them. This expectation translates to clinical trial participation. They've set a new standard. What are patients expecting?

- Navigated journey
- Education at every step of their journey
- Empathy
- Personalized interaction
- Ability to drive their own healthcare experience

We at 83bar have conducted hundreds of campaigns, with nearly a million patient prospects over the course of the last five years. When we mined our own clinical trial patient data over a one-year period, we identified some key insights on how to improve the way we deliver campaigns for clients going forward:

1. Rapid response time matters. From the moment a patient has finished an online pre-qualification survey to the time they are contacted by, in our case, a nurse in our clinical contact center, is less than five minutes. The faster the response time, the higher the contact rate.
2. Speed of communication. Every minute counts. From the time of that initial contact to the scheduling of a first office / screening visit, is measured in minutes. The longer it takes to book that first appointment the lower your scheduled rate.
3. Persistence is critical. With a rapid contact rate, the likelihood of reaching a patient on the first try is high. But it is important to not give up if you didn't reach them the first time. The ability to get those patients if you reach back out quickly a second, third or even fourth time will exponentially increase their inclusion in your trial. This requires an automated system that is actively tracking and engaging each individual patient.

4. Traceability impacts effectiveness. From first click on an ad set through to randomization it is important to be able to track each step of a patient's journey and measure it in minutes. The shorter the time from that first contact with that patient to the actual date of their first office / screening visit, the more likely it is that they will show up.
5. Quality not quantity "wins". The quality of patients received by a clinical trial site impacts a site's ability to screen, enroll, and ultimately randomize a patient into a trial. 83bar clients and their sites often comment on the difference seen between our pre-qualified, activated patients and the leads that are generated through awareness-only efforts. The more pre-qualified patients that show up, the fewer leads that need to be generated.



In closing, we all have individuals in our clinical trials. We have the ability and technology to personalize the experience for these patients at scale.

When we do that, we're going to expand the number of patients available for clinical trials. We'll reduce time, we'll reduce costs, and most important, we will get the medicines to the right patients as quickly as possible.

Connect to these meetings for 2020

SCOPE - Summit for Clinical Ops Executives

<https://www.scopesummit.com>

BioPharma eMarketing Summit

<https://curtisoulter.com/2020-biopharma-emarketing-summit-west>

DPharm

<https://theconferenceforum.org/conferences/disruptive-innovations-us/overview>

Clinical Trials Patient Experience Summit

<http://panagorapharma.com/connectedpatients>

CNS Summit

<https://cnssummit.org>

All brands used in the article are trademarks of their respective owners.

Patient Activation

83bar has developed a 4-part patient activation system integrated to:

- LOCATE prospective patients through risk assessment and health surveys;
- EDUCATE them to offer solutions and help them make informed decisions;
- NAVIGATE patients to action by appointment scheduling or service fulfillment; and through comprehensive follow-up; and
- ADVOCATE on behalf of improved treatment and health care.

Our expertise includes a wide range of medical categories:

- Aesthetics
- Cardiology
- Diabetes
- Endocrinology
- Gastroenterology
- IV therapy
- Men's health
- Molecular diagnostics
- Nutrition
- Oncology
- Ophthalmology
- Orthopedics
- Rare disease
- Surgery
- Urology / Urogynecology
- Women's health



\$1 billion+ in DTP acquisition



18% average Facebook conversion



900,000+ patient prospects



>7:1 average ROI for partner companies



25+ partner companies



For full report data, contact:

Bob Baurys
President & CEO
(512) 592-9177

bob@go83bar.com