

Finding novel ways to generate fresh evidence for mid-lifecycle assets.

Challenge

Exploring real-world studies

Global pharmaceutical company Menarini has a diverse portfolio comprised of mature in-licensed assets for long term chronic illnesses in pain, cardiometabolic, and respiratory indications, among others.

An established brand can struggle to create fresh evidence with which to engage physicians, and the company was searching for ways to touch upon every possibility to produce real-world evidence that would support the continued commercialization of its products.

Menarini wanted to understand the patient journey in several pain indications to investigate where the gaps were in care and disease management. The company's Asia Pacific medical team is engaged in a variety of real-world evidence generation exercises which include decentralized, virtual clinical studies, advisory board reports, consensus statements, case studies, podcasts and publications.

Looking to take this further, the regional team wanted to explore how it could personalize its messaging approach to communicate with varying patient profiles compromising different emotional needs, demographics, or disease stages.



Customer requirements

Above the brand and beyond the pill



Menarini's commercial and market access teams reached out to Clarivate™ because they wanted to understand the journey of a patient suffering from chronic disease. They needed to explore where the pharmaceutical company can be most effective in that journey to not only offer therapeutic health benefits, but services and disease management also.

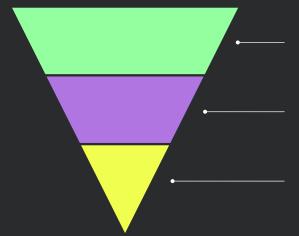
The company knew it was fundamental to understand what the patient needs from their health care professional, and from the pharmaceutical company via that HCP. Menarini had been using a traditional patient journey map that did not include the importance of behavioral and emotional aspects of that journey for both patients and HCPs, alongside the clinical and access lenses.

This knowledge of patient behaviour and emotion would enable the company to go above the brand and beyond the pill by heightening recognition of its products and find places to support both the physician and patient along the length of the journey by providing adjacent support activities. Menarini wanted to integrate patient centricity into all aspects of commercial planning, while showing the value in an established brand.

More specifically, it wanted:

- An integrated journey solution that integrated multiple sources of data to help identify gaps and opportunities for informed commercial planning.
- To identify care gaps along the patient journey in the pain indication, specifically in lower back and post operative pain.
- A research driven patient journey map that depicted the importance of behavioral and emotional issues for the patient throughout the pre-diagnosis, treatment and follow up phases.
- A partner with a deep understanding of the patient centricity space.

Figure 1: Project objectives.



Top 10-15 opportunity moments that could serve as opportunities for any private or public company dealing with issues of pain to act in patients' interest

Top 4 interventions which a pharmaceutical company can employ within its strategies

Top 2-3 interventions that align with Menarini values, needs and business objectives

Solution

Integrated evidence planning through validated patient journey mapping The Clarivate Commercial Strategy
Consulting team based in Singapore
supported by global colleagues
provided a creative guidance
framework that allowed Menarini to
visualize individual markets and assess,
step by step, what patient centricity
meant in those markets, and where
the company could fill the gaps.

Figure 2: Patient journey map across key stages.

Pre-diagnosis	Diagnosis	Treatment initiation	Condition management
Clinical			
Symptom onsetPresentation to physician	MisdiagnosisDisease X diagnosis	1L treatment	2L+ treatment switching and line of therapy
Cost			
Cost of initial visits/testing	Cost of diagnostic testing and procedures	Cost and rejection rate for 1L treatment	Cost, rejection rate and HCRU for 2L+ treatment
Behavioural			
Trigger to seek care	Challenges in providing accurate diagnosis	HCP/Patient treatment decision criteria	CP/Patient switching decision criteria
Emotional			
Emotions prior to diagnosis	Emotional response to diagnosis	Emotional response to 1L treatment	Emotional response to treatment switching

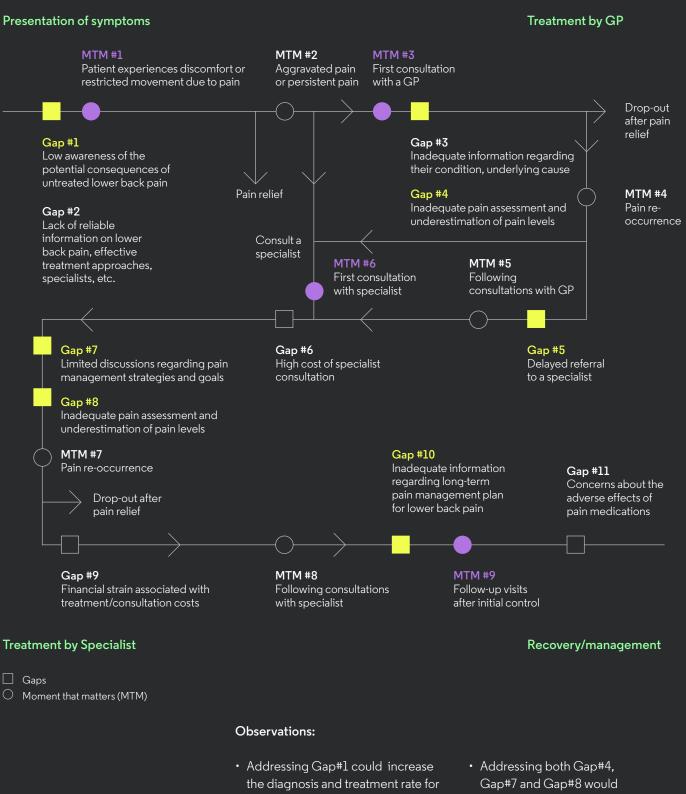
This practical and validated framework allowed the commercial and market access teams within Menarini to consider patient centric-specific initiatives.

Clarivate also ran social engagement activities as part of its delivery:

 It facilitated a roundtable of pain KOLs from Thailand, Malaysia, Singapore, and the Philippines to strengthen partnerships in the region and share results from the journey framework. The outcomes of this roundtable were produced as a publication to bring the ideas into the mainstream pain market.

To consolidate learnings,
 Clarivate ran a workshop with
 the local Menarini market teams
 to discuss implications and align
 on strategic recommendations
 for implementation.

Figure 3: Identifying six key gaps along four moments that matter for improved patient experience and outcomes.



- low back pain patients
- Alleviating Gap#5 could reduce patient's frustration during the initial rounds of consultations, minimising a trial-and-error approach
- lead to an improvement in patient outcomes, experience and satisfaction
- Gap#10 is expected to improve treatment adherence

Figure 4: Identifying key stakeholders and the channels which can address these key care gaps.

	Presentation of symptoms	Treatment by GP	Treatment by specialist	Recovery/ management
Key pain points	Gap#1: Low awareness of the potential consequences of untreated lower back pain	Gap#4: Inadequate pain assessment and underestimation of pain levels Gap#5: Delayed referral to a specialist	Gap#7: Limited discussions regarding pain management strategies and goals Gap#8: Inadequate pain assessment	Gap#10: Inadequate information regarding homemanagement plan for lower back pain
Key MTMs	MTM#1: Patient experiences discomfort or restricted movement cause due to LBP	MTM#3: First consultation with a GP	MTM#6: First consultation with specialist	MTM#9: Follow-up visits after initial control
Stakeholders	 Patients Family and friends Pharmacists Chiropractors Other non-medical practitioners 	PatientsGPs	 Patients Specialists (orthopaedics, pain specialists, rheumatologists, rehabilitation physicians, etc.) 	PatientsGPsSpecialistsPhysiotherapistsChiropractors
Channels*	 Independent pharmacies Supermarket pharmacies Search engines (Google) Social media/radio/TV 	 Independent pharmacies Hospital/Clinic pharmacies 	 Independent pharmacies Hospital/Clinic pharmacies 	 Independent pharmacies Hospital/Clinic pharmacies Search engines Social media/ radio/ TV
Key objectives for change	To cultivate a sense of urgency among the public, encouraging timely visits to GPs/specialists for acute lower back pain	To leverage the collective expertise of diverse healthcare professionals Patient share higher awareness and see the need to seek specialist help	Specialists to educate patients about their treatment goals, plans, necessity of pain medications	HCPs to provide patients with easy self management plans, and emphasize significance to adherence to these plans

Source: 1. Patient interview inputs (n=3), 2. KOL interviews (n=4) | *Channels to seek information and/or treatment

Clarivate expertise

Providing insights to make better decisions



Clarivate was the partner of choice as it helps to connect people with data, analytics, software and expertise. Clarivate leveraged its integrated journey framework to identify market-shaping initiatives along multiple themes such as commercial deployment, clinical strategy and product positioning.

The Consulting team used information sources such as literature review and epidemiology data alongside interviews with HCPs and patients/ caregivers, patient social listening

and workshops to build the foundational hypotheses along four patient journey verticals (clinical, behavioural, access and emotional).

The Clarivate Real-World Data and Evidence team demonstrated its deep understanding of the target markets of Thailand and the Philippines through multi-format data gathering activities where there is little depth of real-world data available. While the Medical Writing team at Clarivate provided expert services for manuscript writing and publication.

Figure 5: Integrated patient journey framework.

Information Analysis and Market shaping initiatives sources insight generation Literature review Commercial strategy/ tactical programs Clinical **Behavioural HCP** interviews Diagnostics, Physicians' and (N = 9)Commercial treatment patients' behavior deployment practice pathway along the journey Patient interviews (N = 7)Access and medical planning Epidemiology data Integrated patient Value message and journey insights Social media listening communication strategy (N = 1000+)**Emotional** Access Clinical strategy **Patient** Coverage, unmet needs, affordability Product positioning key emotions, and pricing why they behave in a certain way

Outcome

Cross-functional alignment on practical steps

The Menarini Commercial and Market Access teams are now able to consider specific initiatives where investment in this patient journey framework will result in improvements in patient care and outcomes, in addition to increased brand awareness in the market.

Clarivate has enabled Menarini to find the patient voice in the pain indication, and identified initiatives within the patient journey that will support better patient outcomes. This is a repeatable process in other indications that individual market teams can apply as part of their annual brand planning and subsequent implementation in their respective markets.

Integrating the patient voice into future brand strategies is now to become the new normal for Menarini as it recognizes the importance of going beyond the pill by providing support services to patients in all the indications its serves.

This patient journey mapping is a differentiator from Menarini's competition, both within the generic and originator space. This pro-patient thinking will be weaved within the material of Menarini's business model to ensure that both brands and extended patient services align with market needs.

"I trust Clarivate to always come up with novel approaches which have extensive research and thought behind them. I look forward to extending the patient centricity initiative in pain franchise to other therapy areas as well."

Dr Ankur Gupta,Regional Medical Affairs Director, Menarini

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