

Embedding Patient Centricity Across Biopharma

From Asset to Enterprise Transformation

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“Commercial strategies that overlook the patient journey miss the point — it isn’t just about prescriptions or even science, it’s about getting the right drug to the right person at the right time in a way that feels personal…like your strategy was always only ever about me.”

Oncology patient advocate, FDA Listening Session 2025

“Research tells us if we can, but patients tell us if we should.”

Anthony Yanni, Astellas, Patients as partners 2025



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Self-Reflection



If you could view your company through a patient's eyes—what would they say you do *for* them, versus *to* them?

If patient outcomes aren't part of your enterprise KPIs, how do you know if you're succeeding?

Can you point to one enterprise-level decision in the last year that changed *because of patient input*?

Who in your organization 'governs' the authentic patient experience?

KPI: Key Performance Indicator

The Strategic Shift: From Assets to Outcomes

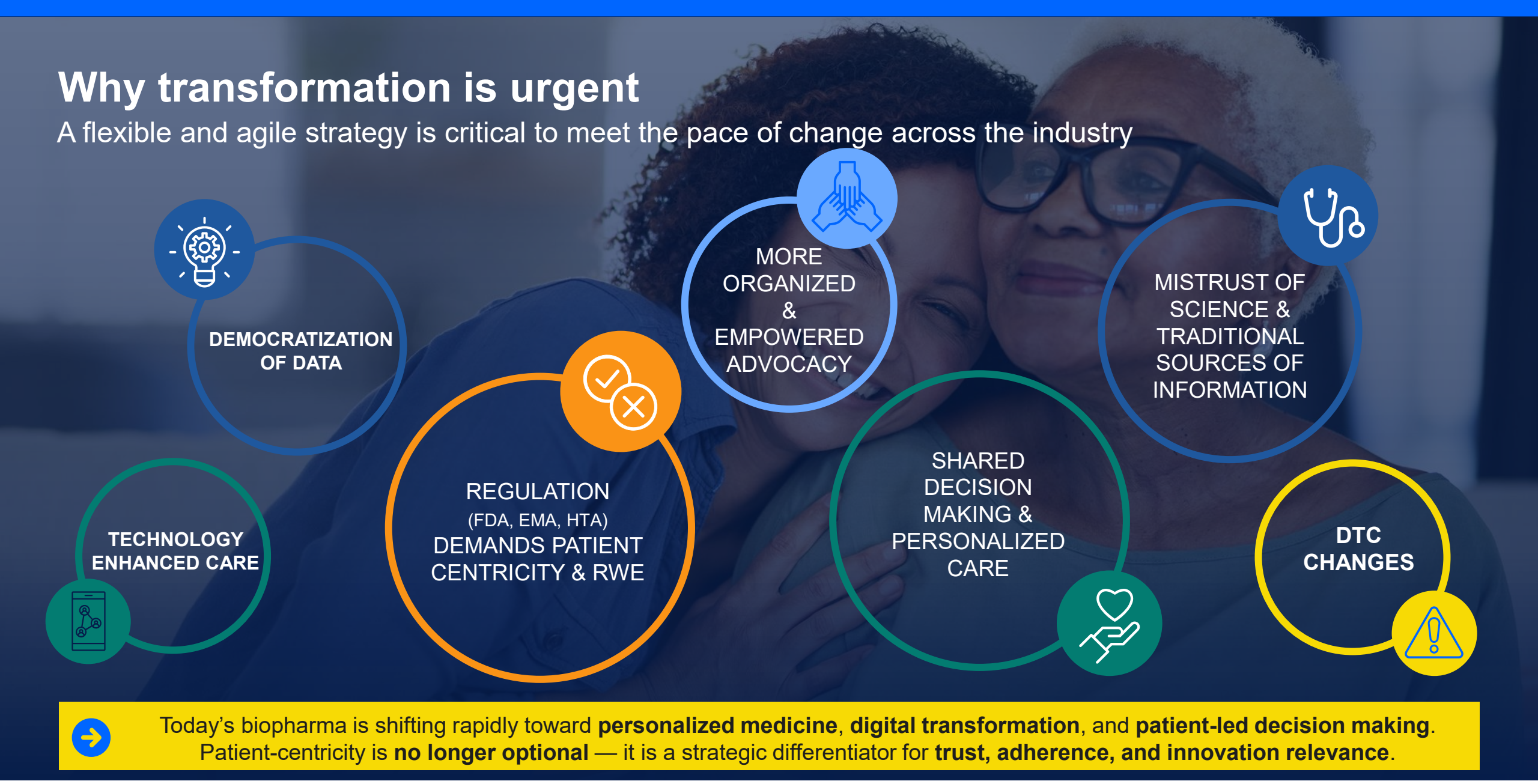
FROM: Traditional Pharma Approach	**TO:** Transformed Patient Centric Enterprise
Pipeline & portfolio optimization	Patient outcome and experience optimization
Product launch as the endpoint	Continuous patient journey engagement across lifecycle
Clinical datasets as source of truth	Diversity of data: patient experience data and RWD drive decisions
Disease and treatment focussed	Life context and well-being focussed
Brand silos	Integrated enterprise around patient ecosystems and segments
Internal data control	Trusted data partnerships with patients and communities
Transactional engagement	Relationship-based feedback models

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RWD, Real World Data

Why transformation is urgent

A flexible and agile strategy is critical to meet the pace of change across the industry



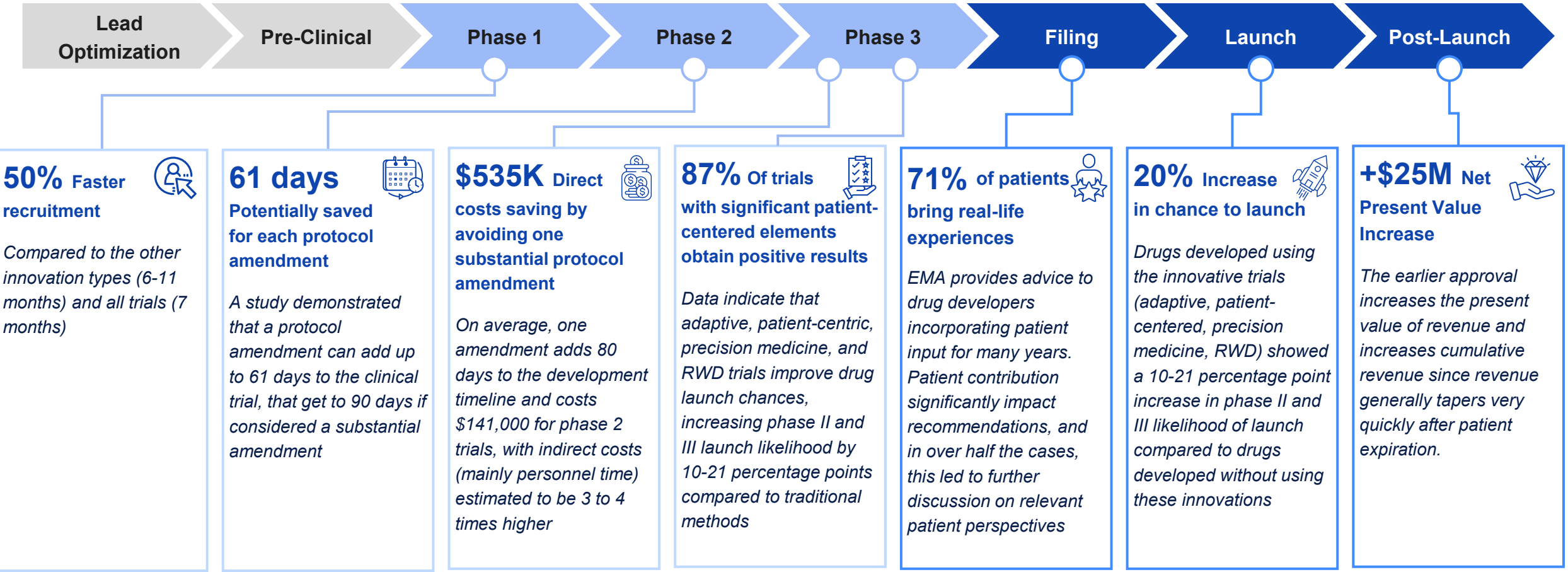
Today's biopharma is shifting rapidly toward **personalized medicine**, **digital transformation**, and **patient-led decision making**. Patient-centricity is **no longer optional** — it is a strategic differentiator for **trust, adherence, and innovation relevance**.

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DTC, Direct to Consumer; EMA, European Medicines Agency; FDA, Food and Drug Administration; HTA, Health Technology Assessment

Patient centricity yields benefits across drug lifecycle

- Utilizing patient-centric frameworks in development, commercialization, at launch and post-launch increases cost savings, enhances brand equity, empowers patients, and results in better outcomes

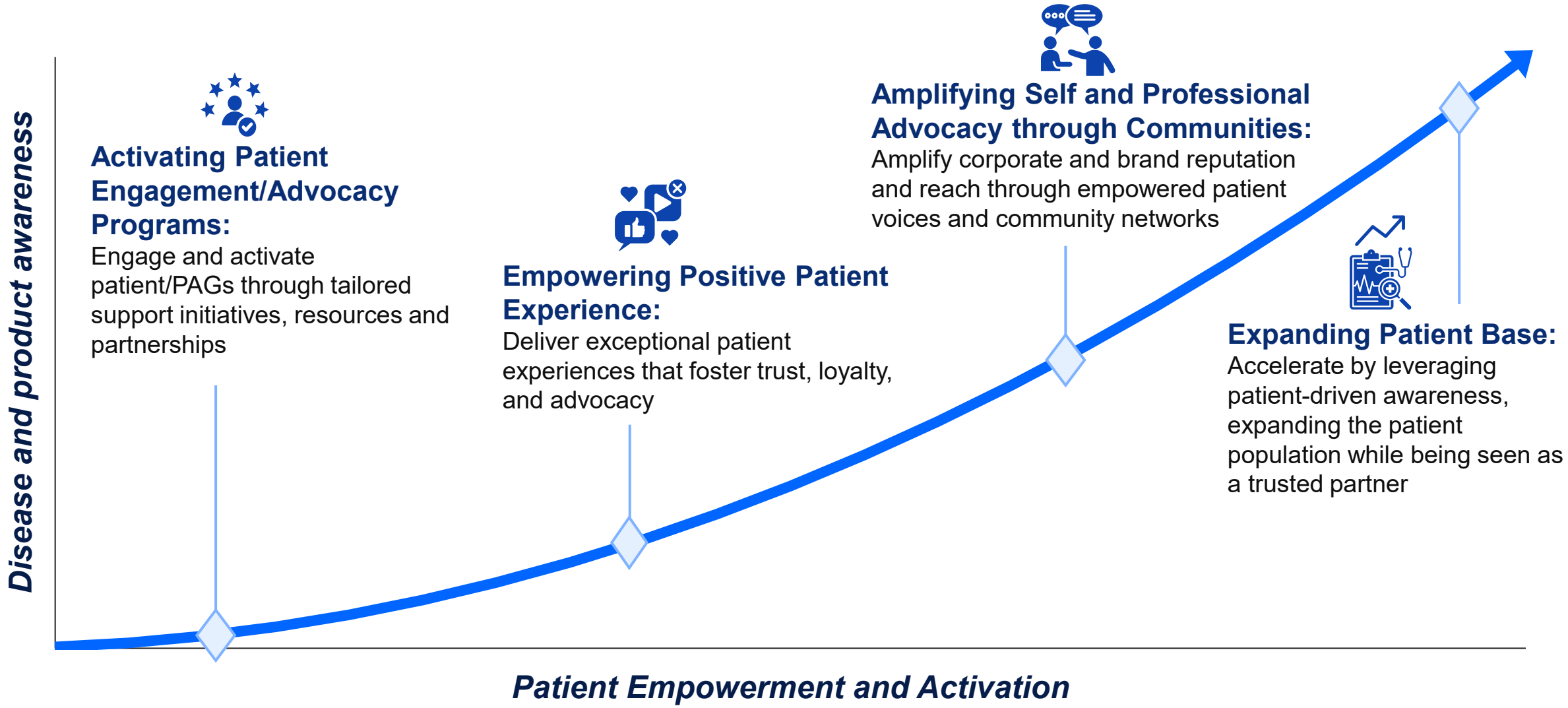


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- Source: 1) Lumanity analysis and 2) www.pfmd.org
- EMA, European Medicines Agency; PFMD, Patient Focused Medicines Development; RWD, Real World Data

PFMD.org Made WITH Patients

Patient-Centricity Drives Compounding Benefits and Differentiation in Competitive Markets



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PAG, Patient Advocacy Group

Where to Start? Redefine your core purpose

THE JOURNEY

Patient centricity cannot be delegated: it must be a mindset, reinforced by culture and incentives

Embed **Patient Impact** as a measurable enterprise KPI

Build an **integrated data and insight** ecosystem of innovation

Reframe brand narratives around **VALUE:** outcome improvement rather than product features

Establish patient centricity reporting to **senior leadership:** build a culture of empathy and agility

Operationalize **co-creation** with patients and communities across the enterprise

By 2030, regulatory and market expectations will make patient input *mandatory*. Early adoption builds credibility and differentiation.

The next generation of "blockbusters" will be ecosystems, not products—combining treatment, diagnostics, and digital support tailored to real-world patient journeys

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KPI: Key Performance Indicator

Patient Strategy Playbook Framework & Content

1. Playbook Definition and Purpose

- Playbook overview, goals, and the critical role of patient-centric GTM strategy in driving success

2. Understanding the Patient

- Refine patient journeys, segments, and personas to authentically capture the voices and perspectives of patients

3. Stakeholder and Ecosystem Mapping

- Align key stakeholders, including HCPs, PAGs, and payers to foster collaboration for improved patient outcomes

4. Patient Engagement Strategy

- Develop strategies to identify, support, and connect patients while evolving with patient-driven insights

5. Patient Support Programs

- Build programs providing tailored support, treatment access, and resources to empower and guide patients

6. Program Monitoring and Evaluation

- Establish KPIs, feedback mechanisms, and continuous improvement processes to track effectiveness and refine strategies

7. Compliance and Ethics

- Provide guidance for engaging patients, caregivers, and PAGs with respect to privacy, ethical standards, advertising & promotion, social media & digital engagement, and patient support programs

8. Best Practices and Lessons Learned

- Share overarching guiding principles, best practices, and lessons learned about patient-centricity

9. Tools and Resources

- Streamline patient-centric processes with tools that facilitate enrollment, feedback surveys, patient/PAG workshops, journey mapping, etc.

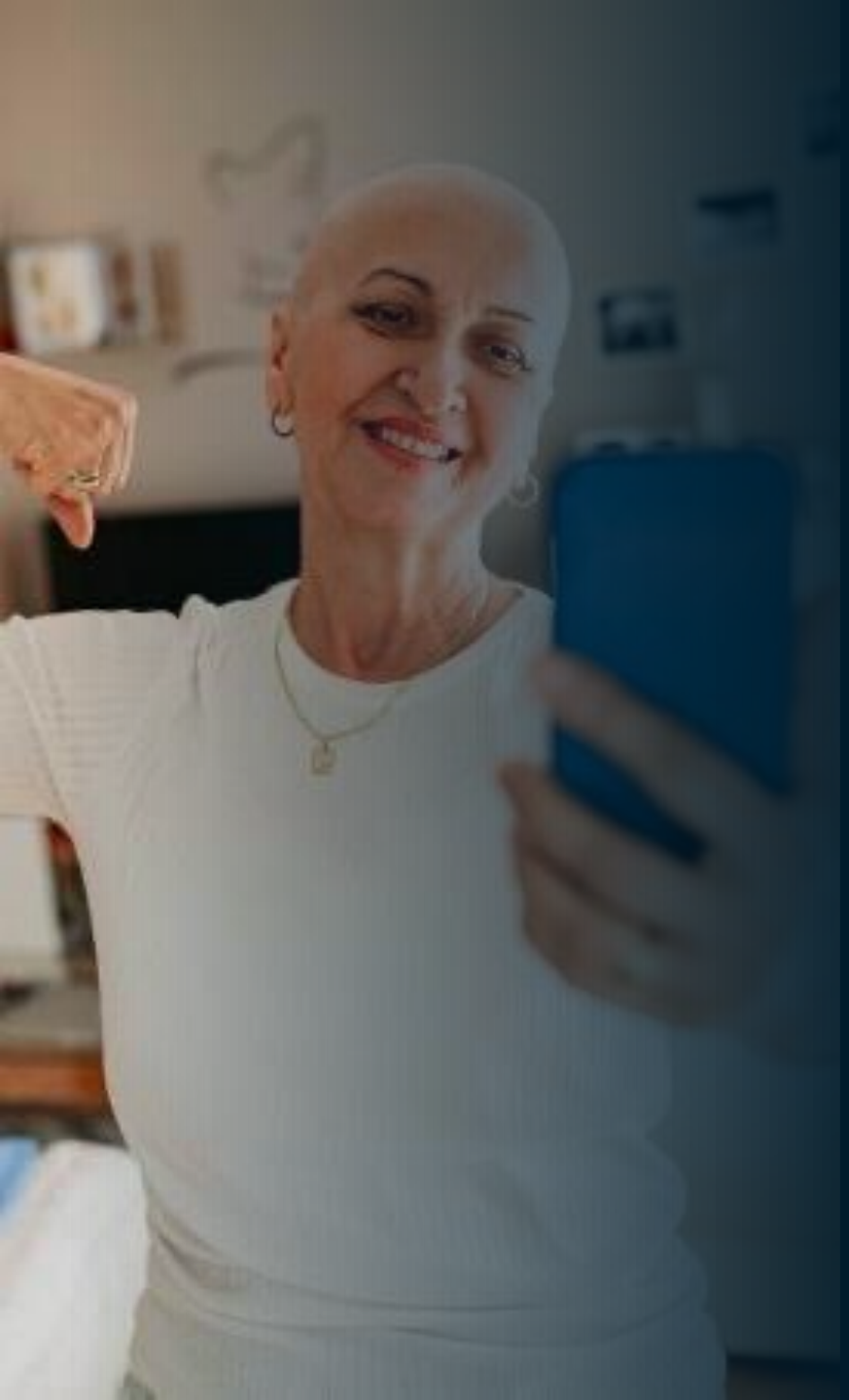
10. Operationalizing Patient-Centricity

- Immediate, mid-term, and long-term path to ensure integration of Patient Strategy Playbook into launch preparations



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GTM; Go To Market; HCP, Healthcare Professional; KPI, Key Performance Indicator; PAG, Patient Advocacy Group



Companies that define their mission around outcomes (not molecules) are positioned to thrive in value-based healthcare ecosystems emerging over the next decade.

In 2025, patient centricity is still often a strategic initiative — by 2030, it's likely to be the ***operating system*** *of the pharmaceutical industry. The companies that succeed will be those that move from listening to patients toward building with patients, integrating patient priorities into every decision from molecule discovery to market access as part of an enterprise wide standard of best practice.*

Q&A



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Thank you

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