



Adversity Inspired Change: The Opportunity for Pharma in Telehealth Amid and Beyond COVID-19

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COVID-19 has brought about many changes, including the way we interact with medical providers. The distribution of health services over electronic and telecommunication channels, or telehealth, surged by 50% in the month of March 2020.¹ This paper highlights how the pharma industry can support this rapid shift in healthcare services.

Telehealth, the distribution of health services over electronic and telecommunication channels, has been available in the US since the 1950's. Twenty-first century adoption has lagged behind expectations, despite recent technological advances. But as COVID-19 disrupts the conventional patient-HCP interaction model, adoption is scaling rapidly to the increased demand.

Historic Barriers to Telehealth

- ▶ Patient Acceptance
- ▶ HIPAA Compliance Constraints
- ▶ Fear of Fraud
- ▶ Continuity of Care
- ▶ Technology Cost
- ▶ Payer Coverage

In March 2020, patient live visit volumes fell 65% in the hard hit states of New York, Massachusetts, California, and Washington. Simultaneously, April telehealth use surged to more than double and the number of telehealth visits is now expected to top 1 billion by year's end.

Forced social isolation and regulatory changes enabled the shift. CMS moved quickly to change guidance for telehealth coverage and commercial payers followed. The suddenness of the pandemic and the impact of social distancing guidelines made providers move quickly, albeit with the assumption that this is a temporary change.

However, the coinciding reduction in live patient visits and increased familiarity with telemedicine may give the trend staying power. Technological innovations will also support the shift, as the promises of the Internet of Medical Things (IoMT) and other areas of new technology to provide remote diagnostics, monitoring, and patient health tracking gain momentum.

What Can Pharma Do to Help?

A new strategy and execution to support telehealth

- ✓ Reimagine how value is created and captured through new medical technology use cases, value chains and business models
- ✓ Support telehealth interactions for diagnosis, therapy starts and adherence with tools for improved provider and patient dialogue
- ✓ Provide resources in the EHR care-path so that HCPs can provide them to patients within their systems
- ✓ Provide updates on reimbursement and coding changes
- ✓ Collate technology options and security grading: telehealth, remote diagnostics, remote patient monitoring, and patient driven health tracking
- ✓ Upskill field teams on virtual engagements, telehealth, and new customer technology stakeholder needs

- Re-imagine technology partnerships
- Collate tech options for customers
- Understand telehealth customer journey
- Provide EHR enabled resources
- Design dialogue tools for telehealth engagement
- Design an agile field force for live and virtual engagement



Mapping the new customer journey

Information that is relevant cuts through the clutter. Pharma has an opportunity to prove itself, once again, as an agile and useful partner in this uncharted new territory for healthcare.

Pharma marketers are very sophisticated at mapping the customer journey through diagnosis and treatment. Now, the journey it is time to update customer journey mapping, both HCP and patient, through telehealth. The telehealth journey, including remote visits, remote monitoring, and even patient administered diagnostics, requires a new understanding. The pharma industry can help move provider-patient interactions beyond transactional conversations and instead support meaningful acute and chronic disease management, therapy initiations and therapy adjustments.

Wherever you are in your telehealth strategy, Herspiegel Consulting can help you develop a business case, define a strategic roadmap, build new offerings, and enhance existing capabilities to quickly capture business value. We have deep experience combining new product development expertise with digital health to drive transformation and enable value-based healthcare.



Contact Us

For more information on how Herspiegel Consulting can help with your telehealth strategy, please contact Beth Schurman at Beth@Herspiegel.com.

We are a full service consulting firm specializing in commercial development and execution for the pharmaceutical and biotech industries.



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