



ZS ASSOCIATES

SALES & MARKETING INSIGHTS

## ZS Interview: Marketers Travel a New Road Along the “Patient Journey”

Participant: Jean-Jacques Raoult

A patient’s experiences through disease progression and treatment is akin to a play—there’s a succession of acts and scenes. For pharmaceutical marketers, observing that play—known as the patient journey—can generate novel insights and help refine brand strategies.

The patient journey has been a major part of pharmaceutical marketing for several years, but only in the past decade have marketers developed the frameworks and techniques to leverage the concept fully. Using a combination of patient-level data, in-depth qualitative surveys and simulation, pharmaceutical marketers can understand how and why different patients are likely to progress through the treatment of a particular condition.

Jean-Jacques (JJ) Raoult, a Principal at ZS Associates, talked about why pharmaceutical marketers are embracing the idea of the patient journey, how the patient journey fits into marketing overall and what are the potential benefits for companies that use it.

## About the Expert

Jean-Jacques  
Raoult,  
Principal

ZS Associates,  
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JJ focuses on global accounts and change management, and has worked with many pharmaceutical companies on sales and marketing issues.



## What is the patient journey, and how does it affect marketing?

**JEAN-JACQUES RAOULT:** The patient journey is observing the different stages the patient goes through, and the decisions that are made through the progression of a disease and treatment. This involves other stakeholders—doctors; health-care providers, like nurses; payers—and decisions made in the retail or hospital environment. It's not looking at just one facet, like how the patient is interacting with the physician, but also other health-care professionals such as nurses, as well as payors, or caregivers who all together shape the patient journey.

When you can see how the journey unfolds, you can see what is driven by facts and what by emotion, which gives you a deeper understanding of the situation, potentially unlocking better, differentiated strategies. Marketers can make better decisions and pick the right strategy or strategies.

## How does the patient journey "work"?

**JJ:** The patient journey is like observing a play at a distance—there are many characters with the patient being the protagonist. The protagonist and characters have to make decisions as they interact with each other. What one character does in Act 1 may affect what another character does in Act 3, for instance, as their experiences are interconnected.

Understanding the play, the deep motivations and their impact on the story can help marketers identify where to improve product performance.

It is really getting to what is happening—what events or decisions that change the paths along the journey, who is involved in the decisions and why decisions are made, for tangible, rational reasons or emotional ones.

## How does the patient journey bridge different approaches to marketing?

**JJ:** The power of the patient journey is the ability to bring the qualitative and quantitative aspects of marketing together to capture realistically the lives of the patients navigating their journeys. Both perspectives are critical to ensure the outcome is sound and can be quantified, but that also the human side of decision making is integrated into strategy. That may seem obvious in theory, but in reality it's usually difficult to integrate both sides, as different team members may favor one or the other.

Finally, in the same way different actors can interpret a play in multiple ways, there are multiple patient journeys; it's important to recognize this variability to ensure marketers pick robust strategies.

## What makes the patient journey particularly powerful in 2011?

**JJ:** It used to be that the doctor was the primary decision maker; now 75% of patients go on the Internet before they even see their doctor, so they play a role in their

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medical decisions. Similarly, the role of nurses is expanding, and they are directly engaged in drug choices. Payers are also playing a bigger role—even office management is becoming an important player. The patient journey helps integrate all of these parties' impact into marketing.

### **How does the patient journey fit when marketing budgets are under scrutiny?**

**JJ:** There is more pressure than ever on market research to get the right insights, but they have to do so more efficiently than in the past. The patient journey can help prioritize where research is the most productive and relevant—first, it ensures research is addressing the key relevant questions for the brand, and second, because the patient journey can help address the impact of the many uncertainties in the market.

### **But given all the pressure, don't marketing teams want to take a "safe" approach to research that confirms what they already know?**

**JJ:** If you don't take risks, you don't explore, and you're missing an opportunity to find insights. You're actually taking a chance that your competitors are going to find something that will put you in a difficult position.

Doing a great job on the patient journey is like insurance. You don't want to have an accident, but in case you do have one, you're prepared. Doing a great job on the patient journey is an insurance policy to make sure you don't leave significant insights on the table that could drive strategy in different directions.

### **Are pharmaceutical companies aware of the importance of the patient journey?**

**JJ:** There is more and more awareness. Most companies have a process to innovation and finding insights. It's important that the organization is aligned from management to brand teams to finding those insights.

So yes, there is awareness of the patient journey, but not all companies are making it a priority or approaching it with passion and rigor. Sometimes one goes against the other—the process kills the passion, and the passion may generate chaos! It's like participation in sports. Some might walk to work, others may jog a few times a week, while others are preparing for an Olympic marathon. The question is are you exercising as a weekender, or are you exercising to be competitive at the Olympics?

How you approach the patient journey is the same. Are you doing it because it's something you have to do, or that you're doing because you're passionate about finding powerful insights that separate your strategy from the competition?

### **So what separates a weekend jogger from an Olympic marathoner?**

**JJ:** Some brand teams rely on more of their beliefs and less on the facts from the patient journey. They had good instincts, but weren't integrating information and data systematically. You need to know not only what's happening, but why—that's customer insights. Those insights are the keystone of strategies.

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When we can leverage the patient journey, clients don't simply rediscover what they already know, but integrate different pieces and tell a story of what matters in the patient journey.

### What is ultimately important in assessing and using the patient journey?

**JJ:** Ten years ago, to do something like a patient journey, you conducted a few interviews with doctors and you drew the decision process on a paper. Today, you have so many tools and information you didn't have five, 10 years ago.

You can't start without a structured approach, just like you don't go with a shovel and start digging for gold somewhere. There is more science than ever about how to approach the patient journey, just as there is more science about how to leverage patient-level data to understand where the patient is going, how fast, and with which probability. But in many cases, the patient journey is underused.

As pharmaceutical marketers, we need to capture how and why doctors are really adopting new drugs. The potential for insights in the patient journey is enormous.

## About ZS Associates

ZS Associates is one of the largest global firms focused on sales and marketing effectiveness. ZS combines deep expertise with rigorous, fact-based analysis to deliver management, business operations and technology consulting to help companies improve performance and results.

With 19 offices around the world, ZS Associates has worked with more than 700 companies in 70 countries across consumer products, energy, high-tech, insurance, medical products and services, pharmaceuticals and other industries. Founded in 1983, ZS comprises multiple affiliated legal entities. Find more at [zsassociates.com](http://zsassociates.com).



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