

# Patient Centricity

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# Roche is a Leading R&D Investor

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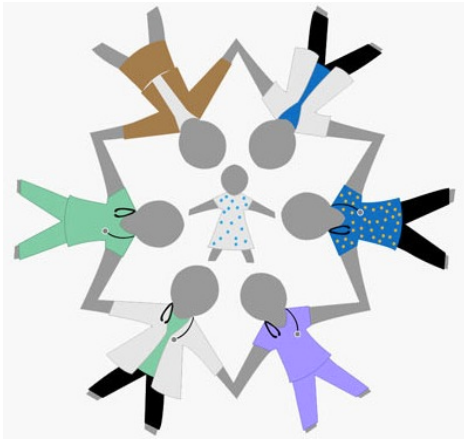
### Exhibit B: The Top 20 R&D Spenders

The top 20 companies were responsible for about 25 percent of the Global Innovation 1000's total R&D spending in 2013. As in past years, this group was dominated by companies in the computing and electronics, healthcare, and auto industries. Google made its first appearance in the top 20 this year at number 12, joining Microsoft in the software and Internet segment.

Rank		Company	R&D Spending			Headquarters Location	Industry
2013	2012		2013 US\$ Billions	Change from 2012	As a % of Revenue		
1	11	Volkswagen*	\$11.4	22.4%	4.6%	Europe	Auto
2	6	Samsung	\$10.4	15.6%	5.8%	South Korea	Computing and Electronics
3	3	Roche Holding	\$10.2	14.7%	21.0%	Europe	Healthcare
4	8	Intel	\$10.1	21.5%	19.0%	North America	Computing and Electronics
5	5	Microsoft	\$9.8	8.5%	13.3%	North America	Software and Internet

***Doing now what patients  
need next***

# Why Patient Centricity? The Future is Now



**Healthcare delivery** continues to move in a **patient-centred direction**

**New technologies** and **access to information** continue to **accelerate**



**Patients' expanded role** and **engagement** can lead to **improved quality of care** and **health outcomes**

# Why Update Our Business Model? Implications and Opportunities



## Insight into the Patient Perspective

Broader view of healthcare stakeholders and how to support them

## New Patient Solutions

Resources for patient's increased role in managing care



## Pioneering Partnerships

Increased need for collaboration

## New Value Opportunities

Stakeholder innovation and value delivery



***Ensure our treatments will not fail the patient***

# Why Patient Centricity is Important: The Future is Now

- Understanding the patient perspective: the same client that our stakeholders, HCPs and payers, are focused on
- Apply understanding to identify gaps in our current offerings: innovative business opportunities and delivering value to our stakeholders
- Developing new offerings to patients who will play an increased role in healthcare decision-making
- Pioneering partnerships in a system that is increasingly focused on collaboration
- Allowing us to play a value added partnership role rather than a commoditized provider of medications

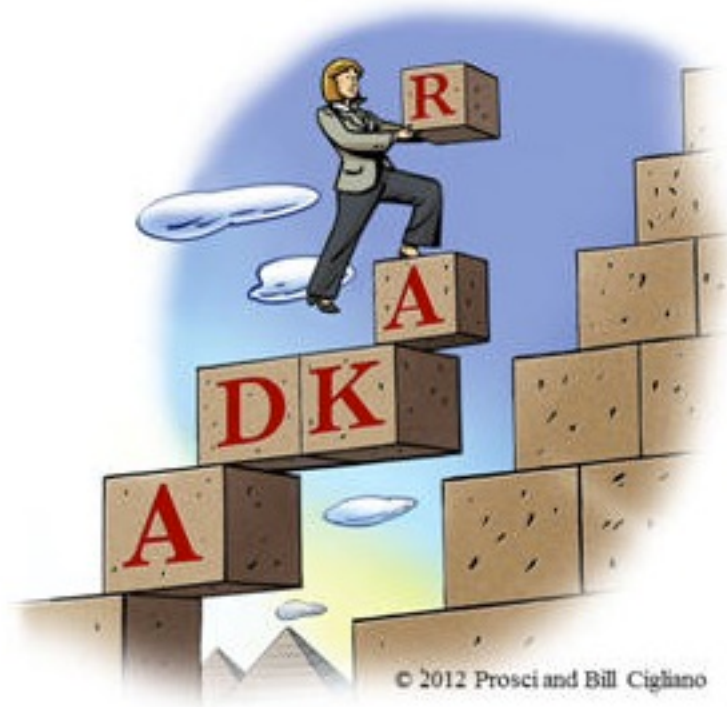
***Ensuring our treatments will not fail the patient***

# Where Did We Start



To align on the path forward - definition is a foundational awareness tool

Awareness  
Desire  
Knowledge  
Ability  
Reinforcement®



## Shifting the conversation from:

- What is Patient Centricity?
- Why do we need to be Patient Centric?

## To:

- How does Patient Centricity affect what I do and how I do it?
- What might I start/stop/continue in a Patient Centric Framework



# PC Definition: Evolving Our Thinking



A **patient** is defined by his or her diagnosis - a **person** is defined by so much more.

At Roche, we seek to **understand “the more”** – and bring our **expertise to partnerships** that will help to **support the person’s healthcare journey** and **all those involved** in their care.

## Trigger words:

A patient/A person



Key concept that patients are defined by their disease but people aren't.

Understand more



Understanding aligns to empathy; more – than present, than competitors...

Expertise to partnerships



Greater clarity that we contribute where we have expertise. Retains the key concept of partnerships. Action-oriented.

All those involved



The family member is often equally involved and an important member of the circle of care





# Defining Patient Centricity at Roche Canada

## *Patient Empowerment and Triple Impact*



### PATIENT EMPOWERMENT PATHWAY

*The Patient Empowerment Pathway speaks to the experience journey a patient must undertake in order to become empowered*



### TRIPLE IMPACT

*Triple Impact defines the benefits that must be generated through Patient Centricity for patients, healthcare stakeholders and Roche*

<p><b><u>Access</u></b> is a didactic, one way flow of information or services</p>	<p><b><u>Engagement</u></b> is a two way flow of information or services that emphasize time for discussion and participation</p>	<p><b><u>Empowerment</u></b> is shared decision making, both large and small, allowing patients and stakeholders influence their own support and services</p>
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# Where Did we Start?

## From Product Centric to Patient-Centred Planning:

- Building a comprehensive understanding of the entire patient journey from their perspective
- Developing new strategies and tactics for journey gaps
- Co-creation of tactics with patients and healthcare stakeholders
- Using Triple Impact to define success

# ***What's Next?***

## ***Inculcating Within the DNA of Roche Canada***

- Identify which processes and systems to adapt
  - Eg. Trial recruitment, employee onboarding, product distribution
- Ensure incentives are aligned
- Visible support from senior leadership
- Developing a consistent approach with stakeholders across all organizational touch points
- Building trusted partnerships with key stakeholders

***Doing now what patients need  
next***