



## POINT OF VIEW

# The patient journey as a lens for personalization



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The foundation for all good engagement planning is a rigorous understanding of your customer. In healthcare, we look at the patient journey as that source of truth to identify the ever-changing needs, barriers, and preferences of individuals over time. While advancements in technology have greatly expanded our capacity to personalize brand experiences in recent years, **how can the patient journey guide you to the right opportunities for personalizing your brand's experiences?**

### Using segments to model the journey experience

Personalization may sound like it implies uniquely individual experiences, but many times these technologies work by instead helping marketers form audience clusters that share similar needs. McKinsey recommends using the journey to determine which are the most critical customer pathways for your business, helping to prioritize where to invest in personalized experiences. Analyses of channel behavior, linguistics, and even how people learn can help brands tailor experiences that:

- **Anticipate patient needs** before they happen
- **Set more inclusive brand objectives** to engage a wider population of customers
- **Target experiences to preferred formats** that drive greater brand satisfaction

### Bringing personalization to life at key journey stages

Identifying which inflection points have the most influence along the patient journey can help marketers allocate resources towards the most critical issues. Let's see how personalization can help provide unique solutions to three common journey challenges:

#### Pre-Diagnosis

##### 1. Driving earlier intervention

Many brands strive to improve the patient journey by instilling urgency and motivating action to shorten the time to diagnosis. Yet, even within the same disease state we find that the reasons driving delay can be complex and multi-layered. By approaching patient engagement through a journey lens, brands can direct action to address differences in the informational, emotional, and functional needs of patients with support that reflects their lived experiences. For example:

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Must the patient communicate information to the provider that can't be observed during the exam?	Delivering Shared Understanding: <b>Improving dialogue</b> and recognition of important traits about the undiagnosed condition
Does diagnosis require testing or an invasive procedure?	Delivering Clarity and Affirmation: <b>Overcoming patient fear and anxiety</b> with certainty of what to expect in the process ahead
Has the patient been referred to a specialist?	Delivering Patient Empowerment and Advocacy: <b>Maintaining forward progress</b> under the care of a new provider to avoid further delay

Building personalization into tailored discussion guides, targeted digital media, or timely SMS reminders can be deployed with a range of message variations to focus on driving completion of priority actions.

### Treatment Onboarding

## 2. Humanizing a daunting treatment experience

At the start of a new therapy, patients may be feeling a mixture of contradictory emotions such as hope and worry, eagerness and skepticism, nervousness and relief. In every brand interaction and the moments in between, patients are re-evaluating the decision to continue the prescribed treatment path before treatment comfort and habits have been formed.

Provide patients with a greater sense of security in their treatment decision by personalizing experiences throughout the onboarding process across a variety of channels:

- **Tailor patient imagery to match demographic data gained at registration** to instill greater confidence in the fit of the brand to the patient
- **Develop dynamic email sequences using modular content** that mines search data for clues to select more relevant key CTAs and messaging
- **Develop brand feedback loops using quick response SMS surveys** to tailor best next messages, connect patients to support services, and thwart would-be threats to adherence

### Re-evaluation

## 3. Evaluating progress on therapy

The point of follow-up can be “make it or break it” moments for many brands, as providers and patients examine the efficacy and burdens of therapy to determine the path forward in treatment. Here, tailored experiences can help put brand benefits into more tangible terms for patients to feel confident enough to continue therapy moving forward.

- **Deploy treatment chatbots and live concierge services.** Providing remote check-ins with patients helps manage patient expectations to avoid premature drop-off
- **Elevate patient stories and efficacy data for follow-up visits to brand.com and social media,** reinforcing confidence and expectation during trial stage and beyond
- **Aggregate evidence of cumulative patient progress** reported at the outset of treatment, or at key milestones over the trial period and ahead of typical follow-up appointment cadences



## POINT OF VIEW CONT'D

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For brands looking to use physician follow-up as a moment to drive switch to a challenger brand or new class, strategies to align messaging across HCP channels can spark belief in the insufficiency of current therapy. This can be particularly effective in therapeutic areas absent of clear guidelines that dictate line choice or categories that lack standardization in the length of therapy trial periods.

#### **Beginning your brand's personalization journey**

There's no simple switch to flip that can build a personalization engine overnight. The patient journey is a powerful lens to identify the most pressing inflection points for your business, helping brands activate tailored experiences to maximize impact.

The Evoke Center of Excellence on Personalization helps marketers approach the promises of marketing technology with clear, actionable, and human-centered solutions to tailored customer engagement. For more information, email us at [business@evokegroup.com](mailto:business@evokegroup.com).