



Disruptive Innovation in Population Health: Pharma's Role in Improving Health Outcomes

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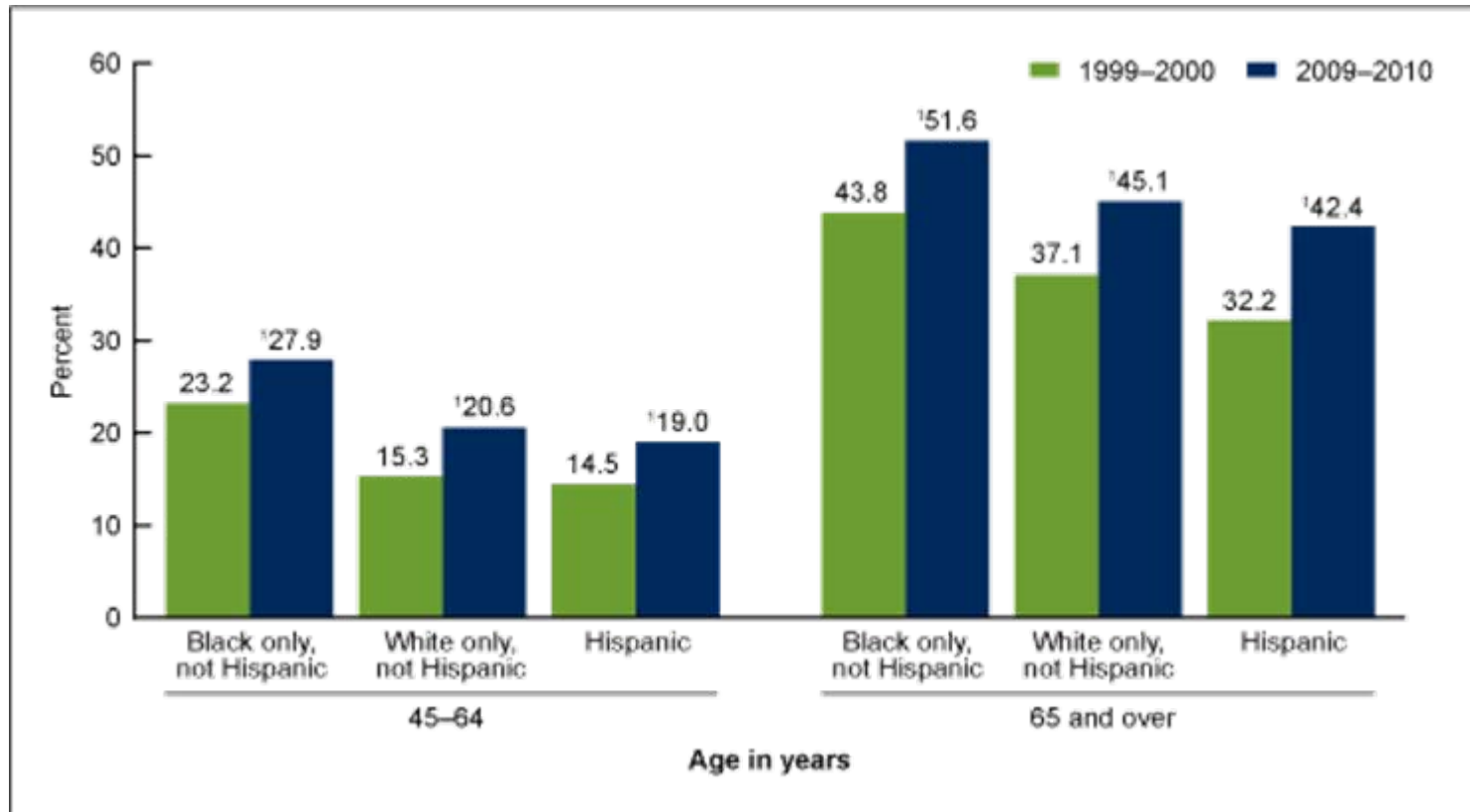
**“THE VIEWS EXPRESSED IN THE
PRESENTATION ARE THOSE OF THE
PRESENTER AND DO NOT NECESSARILY
REFLECT THOSE OF SANOFI US”.**

Roadmap

- **Background: Goals and Current State of Health and Healthcare in the U.S.**
- **Changes in the U.S. Health System:
Implications for Pharma**
Volume → Value
Process → Outcomes
- **Role of Pharma in Accelerating Improvements in Population Health**

A Changing Demographic

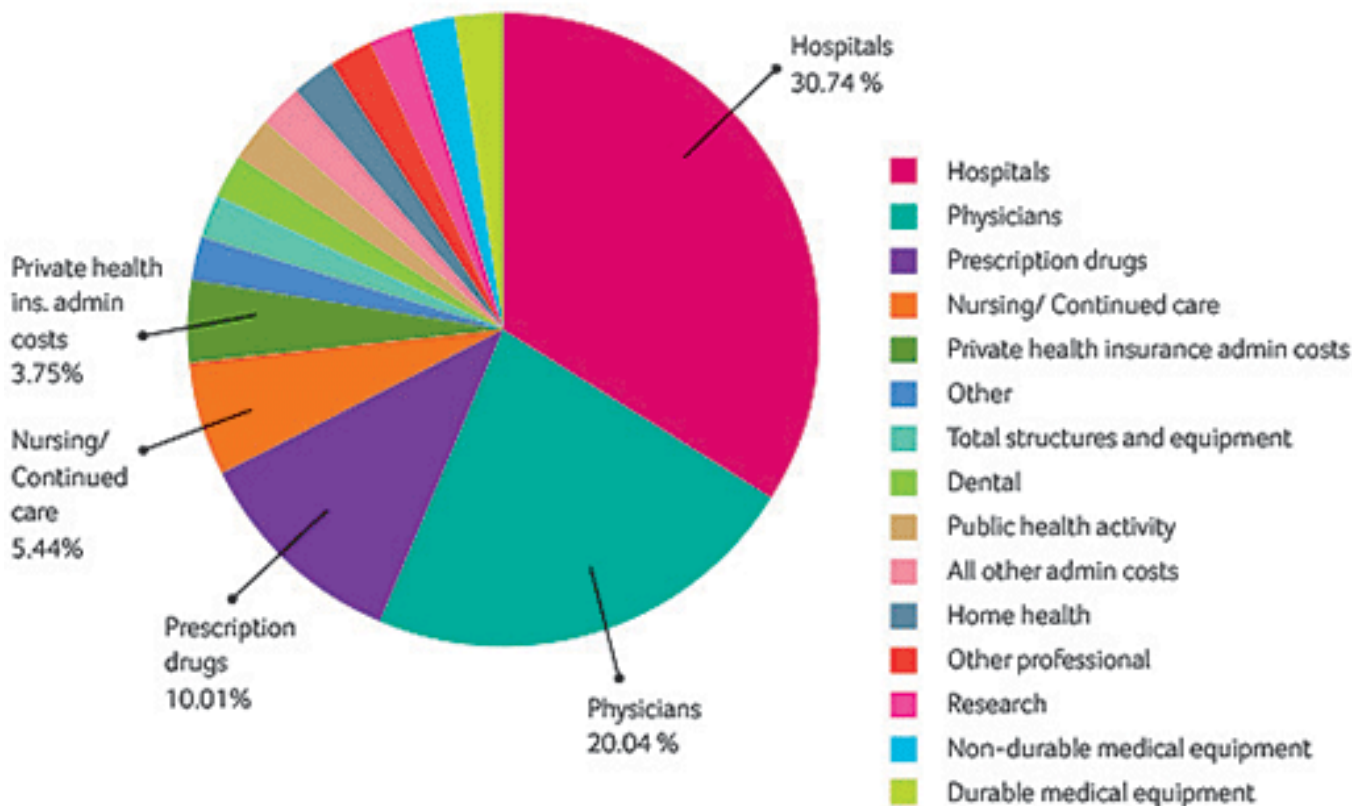
Prevalence of two or more of nine selected chronic conditions among adults aged 45 and over, by race/ethnicity: United States, 1999–2000 and 2009–2010



Source: CDC/NCHS, National Health Interview Survey.

Spending on Health in the U.S.

U.S. Health care spending breakdown, 2010



Source: Center for Medicare and Medicaid Services

Key challenges and opportunities for Population Health Management

- Data integration and insight
- Value-based purchasing and reimbursement
- Patient engagement: extending access through community health
- Care coordination and management through Integrated Delivery Networks (IDNs) and Patient-Centered Medical Homes (PCMHs)
- Organizational change and physician education/evolution to support the above
- Managing the escalating cost of Specialty Pharmaceuticals

Patient Engagement is a Strategic Imperative in a Shifting Health Care Delivery Environment

For Key Stakeholders



PATIENTS

Need for more rapid and efficient drug development;
Focus on self-management



HEALTH CARE PROVIDERS

Volume → Value



PAYERS

- ✓ Moving from “individual payers” to “organized payer groups”
- ✓ Shift to value-based purchasing (including measures of patient outcomes and experience)



REGULATORS

Increased inclusion of Patient Reported Outcomes



EMPLOYEES

Increased sense of purpose and pride



SHAREHOLDERS

Recognized as a company that anticipates and meets patients' needs; sustainable business model focused on outcomes

Examples:

Patient Engagement- Extending Access Through Community Health

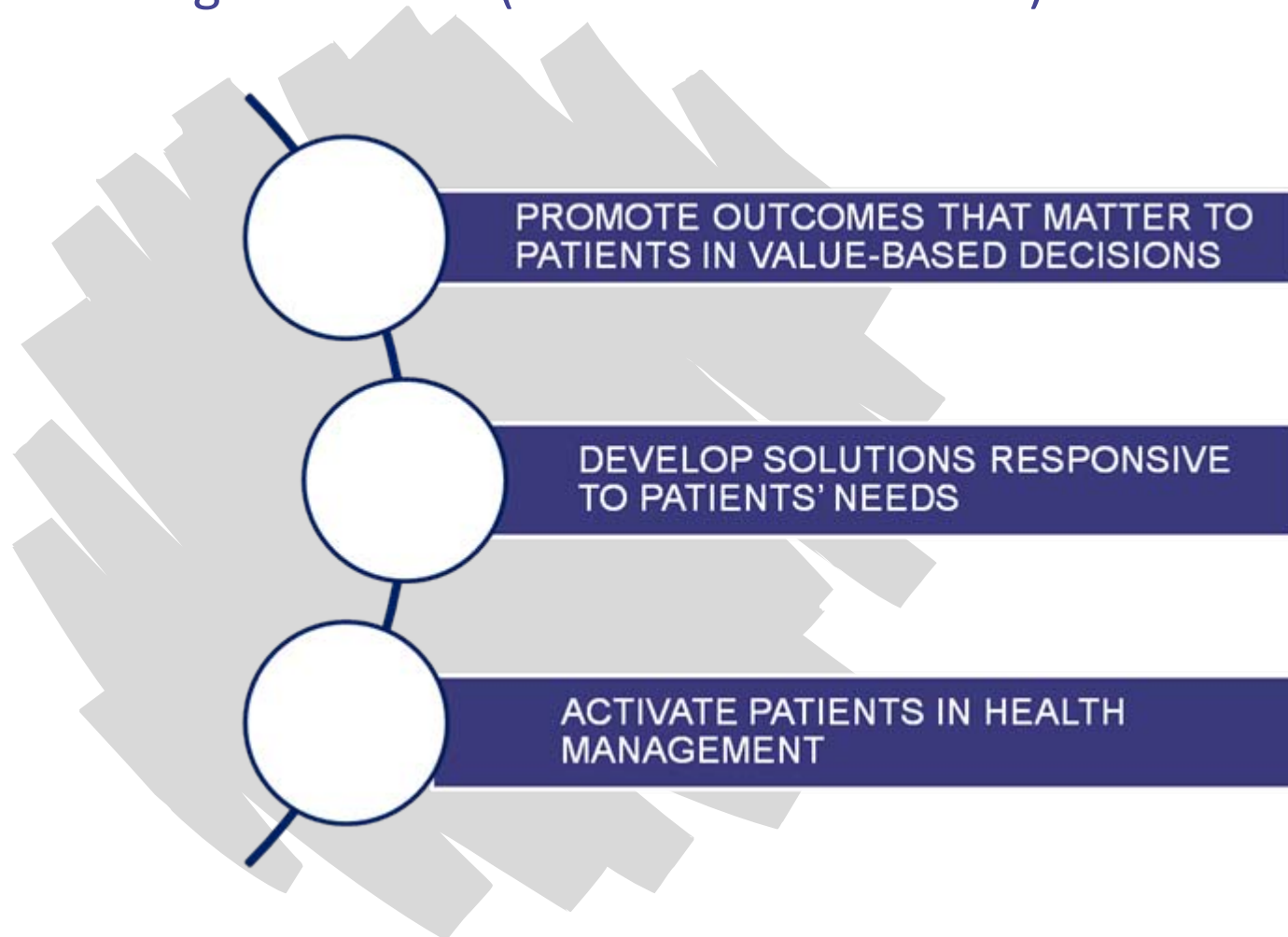
- Examples of efforts to encourage patient engagement and improve adherence and population health outcomes:

- Offer discounts to patients who complete entire course of treatment and offer “first fill” support programs
- Ensure patient views are reflected in value-based assessments of innovative therapies
- Encourage development of clinical decision supports for “at-risk” populations and patients and providers
- Support patient-relevant outcomes data collection and analysis
- Go BEYOND THE PILL...Develop *Accountable Medical Villages*, in which delivery system actors (e.g. provider groups, hospitals, pharmaceuticals, and community organizations) partner to provide maximum access to innovative therapies and high quality care



SO WHAT'S NEW?

Moving to a "RTP" (Return to the Patient)



Thank you.

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