IQVIA

What Every Patient Support Leader Needs to Know Going into 2025

NANCY MCGEE, VP & GM, U.S. Patient Support Services, IQVIA
JENNIFER MILLARD, VP, U.S. Integrated Patient Support Services, IQVIA

For patient support leaders, the start of a new calendar year is an ideal time to pause, reflect on where the industry has been, and anticipate the challenges and opportunities ahead. While no one knows exactly what 2025 will bring, what follows are four top-of-mind trends — along with potential implications for patient support services.

1. Legislative and policy changes are unpredictable. Stay focused on the mission: helping patients get and stay on therapy

The pharmaceutical industry has spent the past couple of years preparing for the impacts of the Inflation Reduction Act (IRA) of 2022. With a new presidential administration, it's fair to wonder if the law will be revised and how legislative changes, as well as Cabinet-level policy shifts, could affect the life sciences industry.

What we do know is that the first quarter is *always* a time of high demand for patient support services, as people discover that formularies have changed. We expect 2025 to bring even more confusion and higher call volumes than usual for two reasons. The first is that Medicare beneficiaries may opt in to the Medicare Prescription Payment Program. The second is that experts anticipate impacts of the IRA spilling over into commercial plans — leading to increased use of utilization mechanisms for *all* patients.

In other words, new therapy starts won't be the only ones who need support; many patients will encounter access and affordability hurdles they thought they had cleared. If you haven't already, consider developing or updating FAQs and call guides so staff are better prepared to manage the influx of calls and questions.

2. Macroeconomic pressures are mounting. Patient support leaders will need to prioritize efficiency in program design and execution

Among other factors, the IRA has created financial liabilities and exposure that are compounding economic pressures for the life sciences industry. Margins continue to be compressed in the face of growing access costs and price constraints. Research and development remains the focal point for investment, and the commercial side of the business has already done significant belt-tightening. In 2025, we expect patient support services to become a target for cost cutting and efficiency improvements.

In the quest to contain costs, patient support leaders must find ways to drive efficiencies without negatively impacting treatment journeys. In fact, strategies shouldn't be either/or propositions. They should offer both higher efficiency and better patient experience — which brings us to our third trend and takeaway related to Artificial Intelligence (AI).

3. AI will become "must-have" technology. Start with these use cases

Amid legislative and policy uncertainties and growing economic pressures, AI — including generative AI — can help patient support programs become more agile, more efficient, and more effective at delivering tailored, relevant support to patients.

Until recently, patient support programs have mostly talked about AI. We believe 2025 is the year when programs will be forced to start walking the walk. Based on IQVIA experience delivering AI-enabled patient support, we have identified two use cases that programs can implement with confidence:

Start with real-time sentiment analysis
AI makes it possible to transcribe and analyze in-the-moment interactions between agents and patients. The technology can send alerts that help support staff more quickly recognize and address patients who are upset or whose needs are not being met. This use case is comparatively low risk and simple to implement, as it does not require Medical, Legal, and Regulatory (MLR) review. It simply provides additional insights to guide the people who are delivering support.

Expand into real-time insights on operational basics
Patient support leaders spend a significant amount of time on what we would call the "operational basics" of patient support services. Traditionally, these reviews have been highly manual, often occurring long after services were delivered. By embedding AI within telephony and customer/patient relationship management platforms, it becomes possible to slash the effort required to monitor and manage service levels, adverse events, and other basic operational metrics.

By starting with use cases like these, programs will build confidence and competency — ultimately leaning into AI-powered insights for greater agility and efficiency.

4. Pricing and staffing are ripe for disruption. Could 2025 mark the beginning of a sea change in patient support models?

As we survey the landscape in which patient support services now operate, we believe that traditional models and assumptions are increasingly fragile. Revising pricing models is an opportunity to be nimbler and more cost sensitive for life sciences manufacturers. Relying on dedicated Full-Time Employees (FTEs) remains an appropriate model for many brands with large programs; for others, a shared model could deliver better metrics and greater cost efficiency.

Despite the uncertainties that 2025 is bringing, IQVIA remains enthusiastic about the vital role that patient support services play in helping people start and stay on life-changing and life-saving therapies. We invite you to reach out to explore how IQVIA could help your program thrive in 2025. Learn more here.

IQVIA