



From Strategy to Practice: Applying PE in Investment Scenarios

(narrative based-cases)

This section brings together the elements of the guide through a practical pathway to help the user develop a coherent and structured **narrative**, enabling them to craft their **own tailored elevator pitch**.

By leveraging the various sections and information within the tool, ensuring a well-organized approach when connecting with investors, while showcasing the added value of PE integration in the investment process.

Focus on case examples:



Engaging socially conscious investors

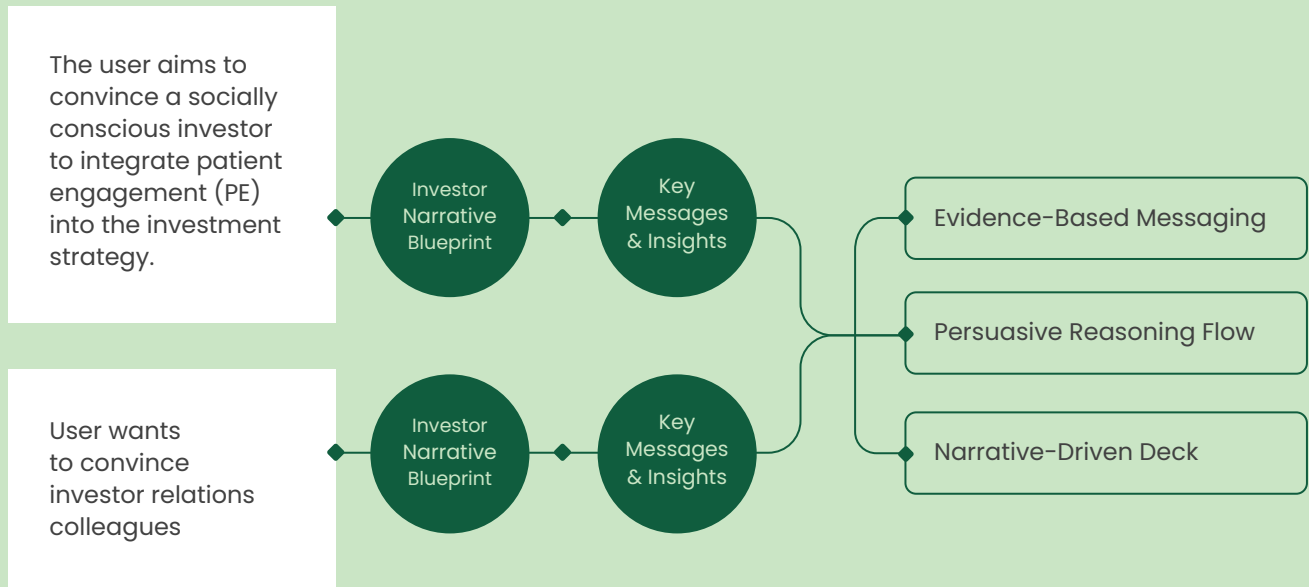


Investor Relations (IR) colleagues

Each example demonstrates how patient engagement can be translated into clear strategies, narratives, and materials that support investment decision-making, risk management, and long-term value creation.

[Access the step by step approach of the case examples here →](#)

User pathway



Suggestion of user pathway for using the tool with investors



- 1 Investor Narrative Blueprint
- 2 Key Messages & Insights
- 3 Evidence-Based Messaging
- 4 Persuasive Reasoning Flow
- 5 Narrative-Driven Deck

Case examples can be found here →

1

Identify investors' priorities

Use the tool to build a narrative:

- Map out investor motivations (use section "Understanding Investor Motivations: What Drives Different Types of Investors?").
- Identify relevant PE benefits that resonate with the investor motivations (use section "PE as a business case: Sustainable financial and societal impact")
- Connect motivations and PE benefits with the investment lifecycle (use section "Integrating Patient Engagement into the Investment Lifecycle")

Expected Outcome:

Establish a link between an investor's motivations (e.g. ROI, measurable impact, etc.) and PE

2

Use a language that resonates with investors

Formulate your key messages and calls to action:

- Use your insights from Step 1 to formulate your key messages (how is PE relevant to the investor?)
- Formulate a call to action from your key messages (what are you expecting the investor to do?)

Expected Outcome:

Develop key messages based on the investor's motivation and their link to PE, and calls to action for the investor, using a language that resonates with them

3

Show data that align with investors' priorities (e.g. save money, ROI)

Select evidence to support your key messages:

- Case studies & peer-reviewed evidence of PE improving patient & business outcomes (use section "PE as a business case: Sustainable financial and societal impact" & "Case examples of investor types and their investment choices")

3

Show data that align with investors' priorities (e.g. save money, ROI)

- Select relevant PE tools that can support your calls to action (use section "Integrating Patient Engagement into the Investment Lifecycle")

Expected Outcome:

Establish an evidence-backed, data-driven foundation complementing your key messages and calls to action to align with their priorities (e.g. ROI, measurable impact, etc.)

4

Share a relatable story demonstrating how PE achieves their desired outcomes.

Combine your key messages, calls to action, and evidence into a persuasive reasoning

- Start with the narrative, embedded in the global context, and clearly formulate your key messages
- Present the selected evidence.
- Conclude with your call to action, offering tangible pathways, and position yourself as a partner

Expected Outcome:

Formulate a persuasive yet direct, evidence-backed reasoning showing how PE drives desired outcomes, with a clear call to collaborate for measurable success.

5

Ensure clarity and relevance for investors with a simple, engaging visual.

Use the selected content from this tool to develop your narrative-led presentation:

- Leverage (& recognize the sources) the selected content and shape it to your needs
- Ensure clarity & investor-language relevance

Expected Outcome:

A visual version of your reasoning



SAMPLE

Patient Engagement Elevator Pitch for investors

KEY MESSAGE

Patient Engagement can ensure investor interventions are **competitive** and drive positive healthcare **impact**

So that...

INVESTOR MOTIVATION

Investors can **improve investment** due diligence and reduce portfolio uncertainty, by leveraging patient demand, impact of patient engagement and engagement trends

By leveraging patient demand and the impact of patient engagement, such as...

Patient-informed **individual investments** lead to better market adoption, reduced clinical trial delays, and increased regulatory approvals

MARKET ADOPTION

87%

likelihood of launch for drugs developed with patient-centric designs

CLINICAL TRIAL

25%

predicted reduction in study enrollment time from PE

REGULATORY APPROVALS

88%

of submissions with PED received an FDA statement on its review consideration

Life sciences industry trends indicate the implementation of patient engagement in **sustainability reporting** and standards

as recent analyses from [2023](#), [2024](#), and [2025](#) indicate



Ultimately, Investors can benefit from...

- Leveraging PE to boost investment confidence
- Acting as stewards for PE within industry