



Integrating Patient Engagement into the Investment Lifecycle

In this section you will find **pathways** and **tools** to practically integrate and embed PE throughout the investment lifecycle.

Including:



A step-by-step view of PE integration opportunities across opportunity identification, due diligence, investment decision, scaling & exit/retention phases



Practical examples of PE activities, tools, and resources that investors can adopt

This section provides the “how-to” for applying PE in real investment workflows.

The Investment Lifecycle: Investment works along several steps with distinct purposes

STEP 5

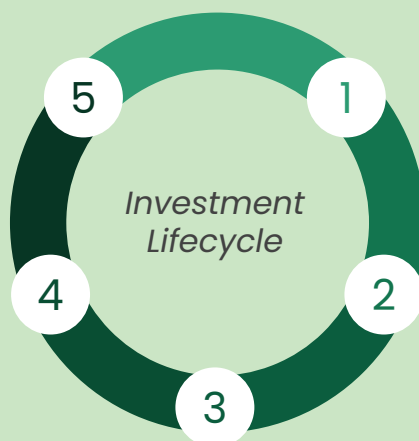
Exit or Retention

Investors decide to sell/exit (via IPO, acquisition, etc.) or hold/retain based on performance and strategy.

STEP 4

Scaling

Driving impact and growth through board participation, impact measurement development, and creating impactful strategies.



STEP 3

Investment Decision

Ensuring long-term impact by incorporating clauses in the shareholder agreement that anchor impact, and safeguarding the mission through the bylaws.

STEP 1

Opportunity Identification

Identifying high-impact opportunities while leveraging network and platforms to seek investment prospects.

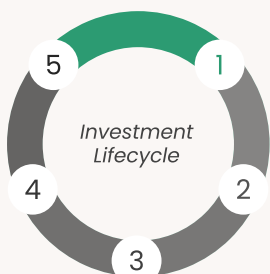
STEP 2

Due Diligence

(Engagement & Assessment)

Assess the purpose and outcomes of each opportunity, focusing on the connection between impact and business

Reference: [LinkedIn Post on Investment Lifecycle](#)



STEP 1

Opportunity Identification

Maximizing opportunities through Patient Engagement

Purpose of PE at this stage

PE aligns investments with unmet needs for opportunity maximization.

Integrating PE

Investors can connect with independent patient experts or patient organizations to scope real-world needs and insights from the target patient community.

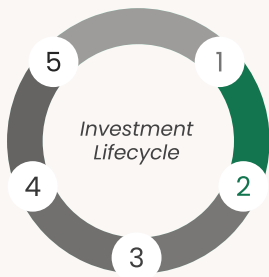
Useful Resource

[PE Quality Criteria](#) - provide a guiding frame to ensure patient engagement is done with purpose, meaningfully, and yields the patient insights authentically.

[Explore more on PE Synapse ISI initiative here](#) →



References: Impact Europe report on [How to do impact measurement & management](#); INVEST4HEALTH workshop [presentation](#) introducing the project



STEP 2

Due Diligence (Engagement & Assessment)

Elevating Due Diligence with Patient Engagement

Purpose of PE at this stage

Patient Engagement ensures that the investment opportunity addresses real-world patient needs and is built around authentic patient insights, reducing investment risk.

Integrating PE

Patient engagement provides direct feedback from patients, helping investors validate the opportunity's relevance and confirm whether a product is being developed with patient insights.

Useful Resource

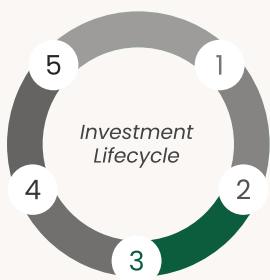
[Sustainability report](#) - provides data-driven insights on how companies are incorporating PE into their ESG and sustainability frameworks.

There are many more resources available on PE Synapse ISI initiative.

[Explore here](#) →



References: Impact Europe report on [How to do impact measurement & management](#); INVEST4HEALTH workshop [presentation](#) introducing the project



STEP 3

Investment Decision

Patient Engagement aligning Investment Decisions with patient preferences

Purpose of PE at this stage

Aligning investments with patient preferences and building confidence that the investment will create market impact.

Integrating PE

Patient insights help investors ensure the solution addresses patient priorities, increasing confidence in its market potential and impact.

Useful Resource

Gilde Healthcare's [PE initiative](#) - underscores the value of PE in the investment decision-making process by integrating patient perspectives into their evaluation and support of portfolio companies.

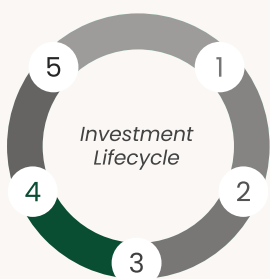
There are many more resources available on PE Synapse ISI initiative

[Explore here](#) →



Gilde Healthcare
[PE initiative](#)

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STEP 4

Scaling

Patient Engagement can solidify Scaling

Purpose of PE at this stage

Engaging patients and facilitating PE with and for investors' portfolio companies strengthens the company's market performance and lasting impact.

Integrating PE

Investors usually assess a company's yearly report and conduct quarterly or ad-hoc engagements with the company's Investor Relations teams to get insights on their areas of interest (e.g. Clinical Trials).

Investors also often have a seat on the Board and advise the executive leadership at a strategic level. PE can help assess the company's performance and be a strategic lever throughout this process.

Useful Resource

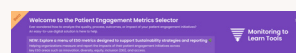
[Global PED Navigator](#) - Helps ensure that companies don't just engage patients, but continuously collect the right experience data to refine their solutions with patient input.

[Metrics Selector](#) - Offers measurable indicators to demonstrate PE's contribution to business growth, market adoption, and ESG and sustainability metrics. Ensures structural integration of PE in business processes.

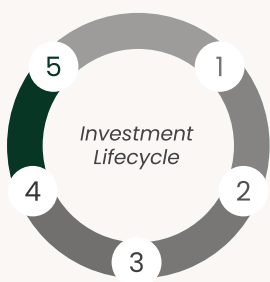
[PE Quality Criteria](#) - Helps build a meaningful PE strategy.

There are many more resources available on PE Synapse ISI initiative

[Explore here](#) →



References: Impact Europe report on [How to do impact measurement & management](#); INVEST4HEALTH workshop [presentation](#) introducing the project



STEP 5

Exit or Retention

Choosing the right Exit or Retention

Purpose of PE at this stage

Patient feedback helps assess the long-term impact, guiding whether to exit or retain the investment based on patient satisfaction and outcomes.

Integrating PE

Feedback and data from the patient community helps determine if the solution has met its promises, is sustainable and balances financial returns with lasting patient value.

Useful Resource

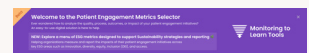
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Additional useful resources

<u>PFMD PEM Suite</u>	→ How-To Guides for Patient Engagement → Patient Engagement Quality Guidance → Global Patient Experience Data Navigator → Legal and contractual tools → Patient Engagement Remuneration & Fair Market Value → Patient Engagement Metrics Selector → Patient Engagement Training
<u>Symmetrian</u>	
EUPATI	→ Recommendations on the required capabilities for patient engagement → Patient Engagement Monitoring and Evaluation Framework
<u>Patient Engagement Synapse</u> (explore 1000s of patient engagement resources, events and much more)	