Marketing

Staying Ahead FOR PATIENTS AND PHYSICIANS

Contributed By:



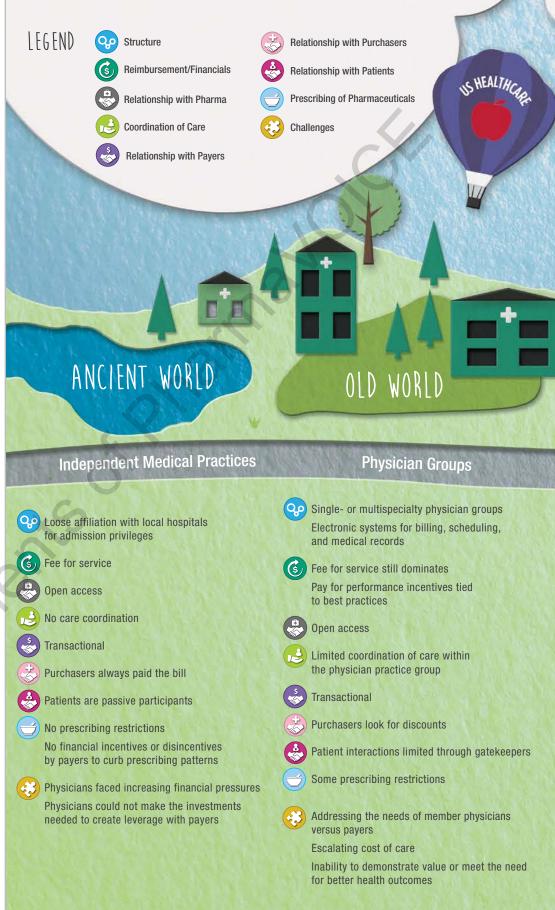
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he healthcare system is undergoing a profound change in how care is delivered, reimbursed, and coordinated. A new emphasis on population health, patient experience, and cost per capita has been brought about through new policy (the Affordable Care Act) and effectively articulated through the "Triple Aim." To best understand how this ongoing evolution could impact the pharmaceuti-

cal industry, it's important to have a clear roadmap that shows where we've been, where we are now, and where healthcare is going. Taken from the perspective of the provider, the following evolutionary roadmap puts changes in their appropriate context to help us recognize how we have evolved into our current environment. In addition, it allows us to appreciate why and how we are going to migrate into the next phase in the evolution of our healthcare system.

With every stakeholder affected by the transformation of the healthcare system, the pharmaceutical industry will need to rethink each aspect of its business-where to invest, what evidence must be generated, what marketing mix should be adopted, relationship with providers, contracting strategies, product positioning, product support, etc. All of these will need to be reevaluated within the context of the evolving healthcare system. Providers are clearly redefining their own business models and looking for ways to establish a tangible value proposition. As such, pharmaceutical marketers need to ask themselves: Are we ready for these changes? Do we fully understand them? Do we know how to position ourselves for success? At Guidemark Health, we help clients successfully answer these questions and more so that their brands can succeed today and in the future. 🖤

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Affordable Care Act

NEW WORLD

Networks

Qo Vertically integrated healthcare delivery networks

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Huge investments in infrastructure and technology

Fee for value

Limited access and often governed by network policy

- Varying levels of coordination across network members
- Collaborations around outcomes-based objectives
- ž Purchasers expect value
 - Consumer-driven healthcare plans and other structures incentivize patients to make healthcare decisions Patient satisfaction starts to matter
 - Treatment protocols drive utilization Strong financial incentives to prescribe within network protocols
- Aligning the incentives of network members Improving health outcomes and value Changing how care is provided Ensuring equity for high-risk patients

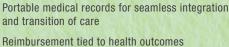
Systems Integration

FUTURE WORLD

Accountable Care

Qo

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Systemwide integration of care

- Reimbursement tied to health outcomes and patient experience
- Û Heavily restricted access and focus on areas of shared interest
- Real-time data and decision making via technology
- \$ Strong integration between payers and provider networks
- 눐 Purchasers look to cut out payers and contract directly with provider systems
- Leverage wearable and mobile technology to engage patients in health coaching and wellness Drive a better patient experience
 - Integrated systems involved in generating their own effectiveness data
 - Treatment protocols drive utilization Strong financial incentives to prescribe within system protocols Support patient engagement and adherence
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Huge technology and data management investments Patient privacy and policy constraints Alignment of incentives across systems Provide consistent quality of care Managing high-risk patients