



Best Programs & Best People

Managed Markets Marketing Programs and Account Support Offerings: Diabetes

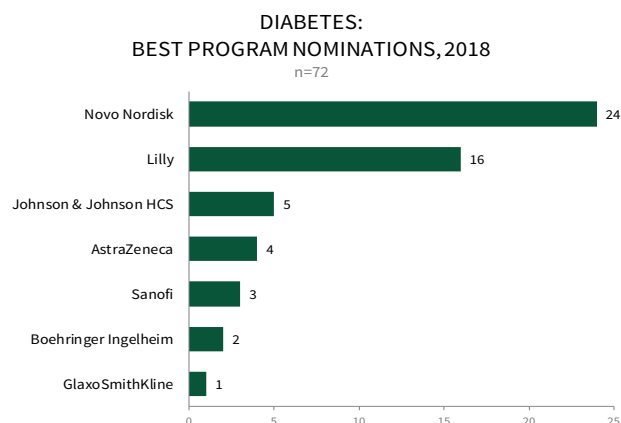
In an increasingly complex managed care environment, a comprehensive understanding of customer needs across therapeutic areas is critical in identifying collaborative opportunities. HIRC's report, *Managed Markets Marketing Programs and Account Support Offerings*, provides an in-depth review of managed care executives' program needs and expectations across seven therapeutic areas, as well as an assessment of manufacturer-sponsored offerings across 13 program/resource types. The full report addresses the following questions:

- What types of programs and resources are currently offered by pharmaceutical firms?
- Which programs/resources are most important across seven therapeutic areas? Which programs/resources are most available across seven therapeutic areas?
- Which manufacturer-sponsored programs stand out to managed care customers as providing the most value?
- What managed care program opportunities exist for manufacturers to distinguish themselves as valued partners?

Key Finding: Partnership opportunities in diabetes emerge as a priority. Customers report unmet needs in Medicare Star rating support, reducing hospital readmissions, and HEDIS support.

Respondents Most Often Select Novo Nordisk as Providing the Best Program/Resource Offerings in Diabetes

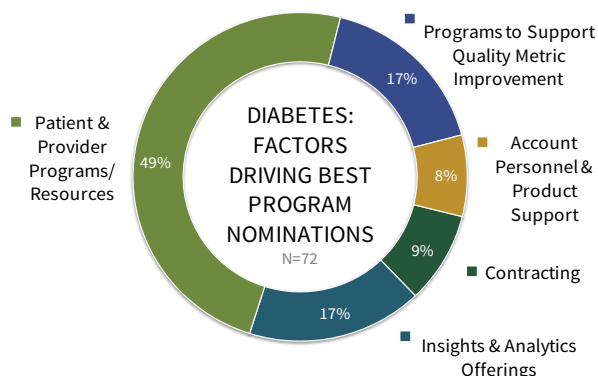
Respondents were asked to consider all programs, resources, and support offerings in the diabetes space that have been offered by manufacturers, and nominate one manufacturer providing the most valuable resource. Respondents most often select Novo Nordisk as providing the most valuable programs/resources in diabetes, followed by Lilly, Johnson & Johnson HCS, and AstraZeneca.



The full report provides a complete listing of best manufacturer program nominations in each therapeutic area, as well as a detailed analysis of factors driving nominations.

Five Broad Factor Categories Operationally Define Best-in-Class Diabetes Program/Resource Offerings

Managed markets respondents were asked to explain their rationale for best program/resource offering nominations in diabetes. Patient and provider programs and resources, such as patient and physician education, account for 49% of all factors mentioned in diabetes program/resource offering nominations, followed by programs to support quality metric improvement, and insights and analytics offerings, each accounting for 17% of all factors mentioned.



The Best Programs & Best People Service provides strategic and tactical information to assist pharmaceutical manufacturers in maximizing the impact of their account managers, medical science liaisons, and value-added marketing programs. The service provides insights into the skills and attributes critical to account manager and medical science liaison success, as well as guidance for the development and implementation of support resources that meet customers' evolving needs. For subscription information please contact:



Lisa Nanfra
Research Director
408-884-8560
lnanfra@hirc.com

Respondents Rank Medicare Star Rating Support as the Most Important Resource Offering in Diabetes

Respondents were asked to consider a list of 13 pharmaceutical manufacturer program/resource support offerings and rate the importance of each offering across therapeutic areas. In the diabetes space, resources to support Medicare Star ratings are viewed as the most important offering from manufacturers, followed by medication adherence programs/resources, reducing hospital readmissions, and HEDIS support.

MOST IMPORTANT MANUFACTURER SUPPORT OFFERINGS IN DIABETES, 2018

SUPPORT OFFERING	% of Panel Indicating Very High Importance
Providing Medicare Star Rating Support	43%
Programs/Resources to Improve Medication Adherence	40%
Programs/Resources to Reduce Hospital Readmissions	33%
Providing HEDIS Measure Support	33%
Programs/Resources to Ensure Appropriate Drug Utilization	32%

Research Methodology and Report Availability

In June, HIRC surveyed 72 key decision-makers from leading commercial health plans and pharmacy benefit managers. Online surveys and follow-up telephone interviews were used to gather information. The *Managed Markets Marketing Programs and Account Support Offerings* report is part of the Best Programs and Best People Service, and is now available to subscribers at www.hirc.com.



HEALTH INDUSTRIES RESEARCH CENTER (HIRC) is an independent, nonpartisan organization that conducts strategic market research on trends in health care, pharmaceuticals and managed care businesses. HIRC's benchmark studies focus on the marketing needs of pharmaceutical companies by providing research critical to the development of successful customer-focused marketing strategies.

16 Lyndon Avenue, Suite 101
Los Gatos, California 95030
P: 408-884-8560 • F: 408-884-8561

www.hirc.com