



## Organized Providers

### Key Integrated Delivery Network Accounts: Market Access and Partnership Landscape 2018

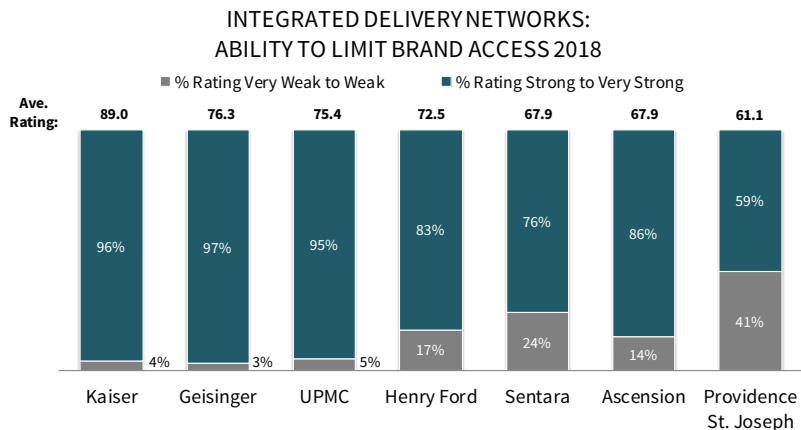
Customers' ability to limit brand access and willingness to partner with pharmaceutical manufacturers varies by company size, strategy, and management philosophy. An understanding of the access and partnership landscape for key provider accounts is critical for effective account planning and strategy development. HIRC's report, *Integrated Delivery Networks: Market Landscape and Strategic Imperatives*, includes manufacturer ratings of select customers' ability to limit brand access and willingness to partner. The report addresses the following questions:

- Which integrated delivery network (IDN) accounts are rated by manufacturers as most able to limit brand access? Why?
- Which IDN accounts are rated by manufacturers as most willing to partner? Why?
- What are the key characteristics of IDNs with a strong ability to limit brand access?
- What are the key characteristics of IDNs that are the most willing to partner?

**Key Finding:** Integrated Delivery Networks rated high in ability to limit brand access are typically characterized by a highly integrated/closed system, tight control/restriction, and a willingness to block access to information.

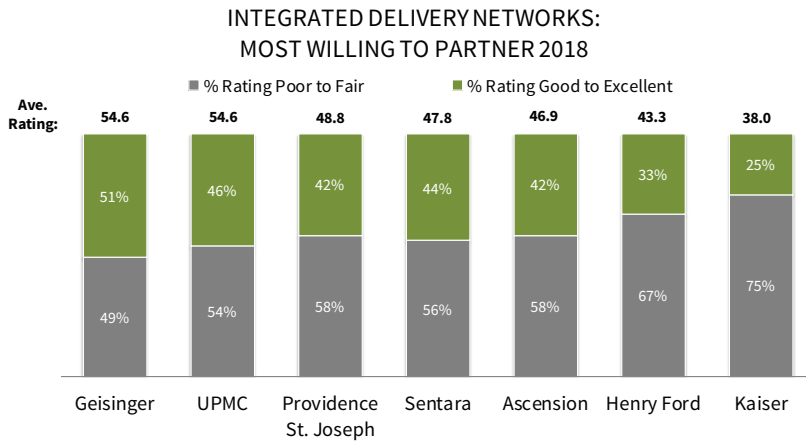
### Kaiser Rates Highest in Ability to Limit Brand Access in the Integrated Delivery Network Segment

HIRC queried managed markets professionals from leading pharmaceutical firms to determine which key IDN accounts have the strongest ability to limit brand access and which are most willing to partner with manufacturers. In the IDN segment, **Kaiser** maintains a strong lead in their ability to limit brand access, with an average rating of 89.0, and is noted for its closed system's control over providers.



## Geisinger Rates Highest in Willingness to Partner in the Integrated Delivery Network Segment

Accounts demonstrating a high ability to limit access and a high willingness to partner provide manufacturers the opportunity to maximize access through program incentives aligned with the challenges and needs of the account. **Geisinger** is an example of a firm that rates highly in both ability to limit brand access and willingness to partner with pharmaceutical firms in the integrated delivery network segment.



**Geisinger** and **UPMC** are noted for their openness to innovative ideas and willingness to partner when mutually beneficial.

The **Organized Providers Service** examines the environmental trends impacting health care delivery, focusing on how increased provider accountability and value-based reimbursement will impact pharmaceutical market access. HIRC's research with integrated delivery networks (IDNs) and accountable care organizations (ACOs) provides market insights and metrics to assist pharmaceutical firms in developing access strategies and quality value-added programs. For subscription information please contact:



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## Research Methodology and Report Availability

In April, HIRC surveyed 64 respondents at 32 pharmaceutical firms. Online surveys were used to gather quantitative and qualitative information. The complete report is available in the appendix of the report titled *Integrated Delivery Networks: Market Landscape and Strategic Imperatives*, and is available now to subscribers of HIRC's Organized Providers Service at [www.hirc.com](http://www.hirc.com).

# hirc

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