



Specialty Pharmaceuticals

Specialty Pharmacy Providers: Manufacturer Engagement and Contracting Trends

Specialty pharmacy provider (SPP) partnerships can effectively shape the brand experience and enhance patient and market access. HIRC's report, *Specialty Pharmacy Providers: Manufacturer Engagement and Contracting Trends*, examines SPPs' evaluation of manufacturers and reviews contracting approaches with specialty pharmacies. The report addresses the following questions:

- Which pharmaceutical firms are most frequently nominated as SPPs' overall "Partner of Choice"? What factors drive panelist selections?
- What types of clinical and data collaborations occur between manufacturers and specialty pharmacies to support brands? Which manufacturers most successfully engage SPPs in collaborative partnerships?
- Which manufacturers are most often nominated as having the best account managers calling on SPPs? What characteristics describe the best-in-class?
- How do 40+ manufacturers benchmark with SPPs in account management support and willingness to contract?
- How common are enhanced service and pricing/performance-based contracts between manufacturers and SPPs? How does this differ by therapeutic area and type of specialty pharmacy?

Key Finding: Manufacturers are actively engaging specialty pharmacies in a variety of collaboration initiatives as SPPs are uniquely positioned to be strong clinical & data partners due to their regular direct contact with patients.

AbbVie and Pfizer are Among Manufacturers Best Engaging Specialty Pharmacies

Specialty pharmacy provider executives were asked to consider and nominate a pharmaceutical manufacturer in three categories: (1) Overall Partner of Choice, (2) Best-in-Class Clinical and Data Collaboration Initiatives, and (3) Best-in-Class Account Manager. Pfizer and AbbVie are consistently among the top rated companies across categories, suggesting strong specialty pharmacy engagement to support their portfolios.

TOP MANUFACTURERS IN SPECIALTY PHARMACY PROVIDER ENGAGEMENT,
Ranked by Number of Nominations in Each Category

Overall Partner of Choice	Best-in-Class Collaborations	Best-in-Class Account Managers
<ul style="list-style-type: none">• Pfizer• AbbVie• J&J HCS/Janssen	<ul style="list-style-type: none">• AbbVie• Pfizer• Bristol Myers Squibb• J&J HCS/Janssen	<ul style="list-style-type: none">• AbbVie• AstraZeneca• Genentech*• Pfizer*• Teva*

*Indicates a Tie

The complete report provides the full listing of all companies nominated, as well as benchmark ratings for a listing of 40+ companies in account support and contracting.

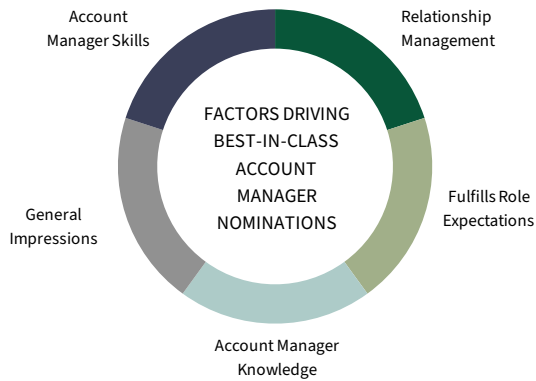
Five Categories Operationally Define the Best-in-Class Specialty Pharmacy Account Managers

Specialty pharmacy providers were asked to nominate a best account manager calling on their organization from Very Large, Large, and Mid-size pharmaceutical firms, as well as explain the rationale for their nominations. Analyses reveal five categories that

describe the best-in-class:

- 1) Relationship Management, 2) Fulfills Role Expectations (how well AMs perform in their role), 3) Knowledge, 4) General Impressions, and 5) Skills.

The best account managers work towards collaborative solutions, are responsive and accessible, and provide timely and relevant information/resources.



The Specialty Pharmaceuticals Service monitors managed care trends related to specialty medication management, such as payers' formulary & utilization management approaches and trends in contracting. Issues in specialty pharmacy distribution and engagement are also reviewed. The service examines specialty brands and benchmarks manufacturers across several high profile therapeutic classes. For subscription information please contact:



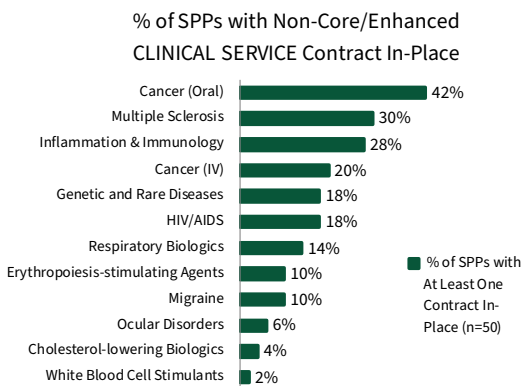
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Approaches to Contracting with Specialty Pharmacies

Manufacturers engage specialty pharmacies in a variety of contracting arrangements depending on the needs of the product. HIRC's research reviews the status of two types of

enhanced service contract types and two types of pricing/performance-based contract arrangements.

When it comes to non-core/enhanced clinical service contracts (e.g., additional nurse/pharmacist outreach), 42% of SPPs report at least one contract in-place for oral oncology medications, followed by 30% for MS and 28% for I&I.



The full report examines analyzes all best-in-class, benchmarking, and contracting data across three SPP ownership types:

- PBM/Health Plan-owned SPPs
- Independent/Other SPPs (includes retail/drugstore chain, wholesalers)
- Health System-owned SPPs

Research Methodology and Report Availability

In April, HIRC surveyed 50 specialty pharmacy provider executives, representing a variety of ownership types. Online surveys and follow-up telephone interviews were used to gather information. The report, *Specialty Pharmacy Providers: Manufacturer Engagement and Contracting Trends*, is part of the Specialty Pharmaceuticals Service, and is now available to subscribers at www.hirc.com.

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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.

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