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Organized Providers Service

IDNs: Evaluation of Pharmaceutical Manufacturer Programs and Support Offerings

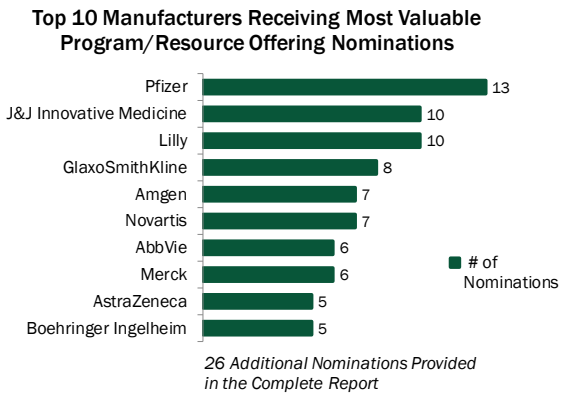
Manufacturer-sponsored support programs and resources—when relevant and impactful—can spark stronger collaboration and drive strategic partnerships with Integrated Delivery Network (IDN) customers. HIRC's report, *Integrated Delivery Networks: Evaluation of Pharmaceutical Manufacturer Programs and Support Offerings,* provides IDN ratings of manufacturer resources, examines the most valuable programs being offered, and identifies opportunities for future support. The report addresses the following:

- Which pharmaceutical firms receive the greatest number of "most valuable" program/resource nominations across 11 priority therapeutic areas?
- What are some examples of the most valuable programs in key disease areas?
- How do 25+ manufacturers rate in presence and overall value of programs/resources?
- How often are IDNs interacting with manufacturers and their programs/resource offerings based on their role/responsibility type?
- How often are 25+ manufacturers providing support to their key accounts across eight unique program types?
- What program opportunities exist to better meet the current needs of IDN customers?

Key Finding: IDNs are most receptive to manufacturer partnerships that extend internal capabilities and help solve tangible patient care challenges. Programs that reduce barriers through education, access/financial support, and care management remain particularly valuable and offer manufacturers a meaningful opportunity to differentiate.

Pfizer, J&J Innovative Medicine, and Lilly Among Leaders in Most Valuable Resource Offerings for IDNs

IDN executives were asked to consider and nominate a manufacturer-sponsored program or resource offering that has provided the most value across eleven broad, high priority disease areas. **Pfizer** receives the greatest number of "most valuable" program/resource nominations, followed by **J&J** and **Lilly**.



26 Additional Nominations Provided in the Complete Report

Nominations were most often provided for patient-centered resources supporting oncology, cardiovascular diseases, and vaccines. **Pfizer** is recognized for its patient access, case management, and population health initiatives, particularly in rare disease and vaccines. The complete report provides the full listing of 113 nominations received across 11 disease states.

Benchmarking 25+ Manufacturers in IDN Programs/ Resource Engagement

For a listing of 25+ companies active in IDN engagement, HIRC reviews the programs/ resource support landscape across three key metrics: 1) Presence (IDN has had experience with a manufacturer's program/resource in the last 12-18 months, 2) IDN ratings of firm's Value of Programs & Resources, and 3) Program Engagement across 8 unique program types. A handful of manufacturers are consistently positioning resources and programs with their IDN target accounts across multiple program categories.

Top Manufacturers Offering Programs Support Across 8 Categories

Access, Reimbursement, & Copay Support	Alnylam, Bristol Myers Squibb, J&J Innovative Medicine
Clinical Staff Training & Education	Otsuka, Regeneron, Gilead, Boehringer Ingelheim
Medication Adherece Support	Moderna, Biogen, Astellas, J&J Innovative Medicine, Vertex
Patient & Caregiver Education	Boehringer Ingelheim, Alnylam, Otsuka, Vertex

4 Additional Program Types Provided in the Full Report, Programs Support by Program Type Examined for 25+ Companies Active in IDN Engagement

Program engagement benchmarks span the following 8 program types and 11 broad therapeutic areas:

Therapeutic Areas Covered:

- Airway Disease
- Behavioral Health
- Cardiovascular Disease
- Diabetes/Obesity
- Inflammation & Immunology
- Neurological Conditions
- Oncology/Cancer
- Ophthalmology
- Rare Disease
- Vaccines
- Women's Health

Program/Resource Types Covered:

- Access, Reimbursement, & Copay Support
- Clinical Staff Training/Education
- Data Analytics/Insights
- Digital Engagement Support
- Medication Adherence Support
- Patient/Caregiver Education
- Population Health Management Support
- Social Determinants of Health/Health Equity Support

Research Methodology and Report Availability

In July/August, HIRC surveyed 51 pharmacy directors, medical directors, and quality/ population health personnel from IDNs ranging in size and geographic location. The full report, *Integrated Delivery Networks: Evaluation of Pharmaceutical Manufacturer Programs and Support Offerings* is part of the Organized Providers Service, and is now available to subscribers at www.hirc.com.

The **Organized Providers Service** examines the healthcare delivery trends reshaping integrated delivery network (IDN) customers, including value-based care, population health, and quality initiatives. The service also extensively benchmarks manufacturer account engagement and programs support. For subscription information please contact:

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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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