

# Pharmacy: Time to Invest?

In the past 10 years, pharmaceutical manufacturers have approached the pharmacy profession with a range of attitudes, from extreme interest to extreme trepidation. While pharmacists are potentially positioned to improve prescribing and outcomes, existing regulatory differences across Canada, current compensation models and the differing agendas of chains, independents and mass retailers have made a “win-win” relationship difficult to establish.

Quebec’s recent Law 90 (Bill 33) expanded the scope of pharmacy, granting:

- greater professional involvement,
- authority to make dosage adjustments and
- expanded therapy follow-up.

Bill 102 in Ontario stipulates: “Pharmacists will be trained and compensated for providing patient counselling and medication management reviews and will increasingly have opportunities to work in primary care models.” While the economics of these initiatives are far from clear, pharmacy groups will organize to



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Table 1

## Potential partnership opportunities for manufacturers and pharmacy

Pharma-manufacturer situation	Solution
<ul style="list-style-type: none"> <li>• Manufacturer is launching a new complex medication into a competitive market; manufacturer has existing relationship with pharmacy</li> </ul>	<ul style="list-style-type: none"> <li>• Establish toll-free hotline and education service and market to patients on behalf of pharmacist</li> <li>• Company-sponsored disease management program with execution at pharmacy level</li> </ul>
<ul style="list-style-type: none"> <li>• Manufacturer’s medication has a strong competitive position in the developed market; must respond to a new entry and has no existing relationship with pharmacy</li> </ul>	<ul style="list-style-type: none"> <li>• Assess pharmacy needs and develop “win-win” propositions</li> <li>• Provide education to pharmacist on product handling</li> <li>• Extensive communication to pharmacy on how drug is supported</li> <li>• Involve pharmacy in “care network” through pharmacy-delivered study and/or disease management initiative</li> </ul>
<ul style="list-style-type: none"> <li>• Mature medication approaching genericization; manufacturer has strong existing pharmacy relationship</li> </ul>	<ul style="list-style-type: none"> <li>• Medication-specific programs aimed at promoting compliance and store loyalty</li> </ul>

Table 1 cont'd

**Market situations and solutions**

Market situation	Solution
<ul style="list-style-type: none"> <li>In the Ontario marketplace, loss of generic manufacturer rebates will fuel interest among pharmacists in pursuing counselling and other patient-focused value-added services, which may supplement revenue from manufacturer and/or government</li> </ul>	<ul style="list-style-type: none"> <li>Manufacturers can differentiate their products in the marketplace by engaging pharmacists to support specialized drugs, such as biologics, through screening, follow-up counselling and adverse event management</li> </ul>
<ul style="list-style-type: none"> <li>Pharmacist counselling and screening can complement conditional listing agreements</li> </ul>	<ul style="list-style-type: none"> <li>Pharmacist program can be presented to Ontario Drug Benefit in support of a conditional listing agreement whereby pharmacists encourage guideline adherence and appropriate utilization through physician education</li> </ul>
<ul style="list-style-type: none"> <li>Quebec pharmacists' ability to adjust dosages may be a proactive risk management strategy when launching in the marketplace</li> </ul>	<ul style="list-style-type: none"> <li>Pharmacist-driven telephone follow-up programs that would screen patients at high-risk of adverse events and identify opportunities for dosage adjustment</li> </ul>

respond to these challenges. Cognitive services will likely increase, fuelled by both public and private funding. Alberta is following a similar agenda. Canadian pharmacists are proposing legislation for the right to prescribe. Manufacturers that proactively engage this group today will be best poised for a fruitful relationship in the future.

*No blanket pharmacy approach*

As summarized in Table 1, there is no blanket pharmacy approach. In addition, there are a number of considerations in choosing the right strategy:

- **Life cycle management:** At early commercialization phases, the role of pharmacy is to educate the patient and

reinforce key messages. New product knowledge is critical. On the other hand, in a more mature pre-genericization phase, patient loyalty mechanisms become a source of market share retention strategies

- **Competition:** When patented alternatives are available, programs that guarantee availability and reimbursement or provide the pharmacy with valuable information for patients are critical. Pharmacy can be used as a supplementary source of awareness building for patient support programs
- **Relationship with pharmacy:** Pharmacists' awareness of and their confidence in a pharma company are key during new product launches. Is there awareness and dialogue? Is it positive? Answers to these questions may drive the pharmacist's investment level

- Compliance challenges?** Whatever the stage in a product's life cycle, adherence is a challenge. Whether this is due to a complex method of drug administration, side effects or reimbursement challenges, providing pharmacy with information and solutions will reduce any discomfort that pharmacists may have about your product. While pharmacists are unlikely to debate prescription of a product with physicians, they can reinforce the physician's decision and provide additional or repeat information if adequately prepared

It is impossible to prescribe a "pharmacy solution." Programs will vary depending on local regulations, competition and the manufacturer's

existing relationship with the pharmacy. Table 1 identifies potential partnership opportunities for manufacturers and pharmacy. **CPM**

For further information about pharmacy strategies, contact Dimitris Polygenis at 1 (800) 811-9880, ext. 121 or at [dpolygenis@phase4health.com](mailto:dpolygenis@phase4health.com)

*McKesson Phase 4 Solutions is a division of McKesson Canada that offers strategic consulting, clinical trial services including late phase clinical trials, health economics and outcomes research, product development and marketing and reimbursement management and payer relations to the pharmaceutical industry.*

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