

EVALUATING MARKET ACCESS

AN INDUSTRY SCORECARD

By Nancy MacLean

Market Access has become an extremely important component of prescription brand success. Provincial Governments and private third party payers are powerful gatekeepers for access to coverage for prescription drugs through their use of formularies. For the past few years, Pharmaceutical companies have been focusing on their relationships with these organizations in an effort to break down potential barriers to the penetration of their brands. In many cases, the formulary submission process has become more strict and streamlined. Both parties have faced challenges in developing effective, efficient processes to satisfy their respective needs.

In a survey conducted January 2002, seven government benefits managers (representing six provinces), nine private insurance benefit managers, and five large pharmacy chain managers who deal with market access indicated that the industry has responded to their needs and raised the bar of service significantly. The leaders have demonstrated their commitment by adhering to guidelines and providing a very high standard of information around their products; and they do so in a timely manner.

Use of a variety of channels of communication, including face-to-face meetings, mailings, telephone contact and e-mail meets the needs of these busy managers. Company representatives are professional and sensitive to the relationships established. The best representatives are a valuable resource and address a wide range of business needs.

Top Performers

Overall, the industry maintains a high level of professionalism and service with this sector. They have found a way to communicate and keep this audience up to date on product developments and reimbursement issues. While some managers do not readily differentiate amongst Pharmaceutical companies in terms of service (stating they are all about the same), there are some companies who do stand out in the minds of many .

Best Practices

Most customers are satisfied with the quality of information being sent to them and the responsiveness of the industry to their information requirements. They appreciate companies who provide dedicated field personnel to address their specific needs. The services that distance the best Pharmaceutical companies from the rest include providing good programs, keeping organizations informed and building strong relationships.

Complete information, advanced notice of NOC, timely and consistent information are characteristic of a strong launch communication strategy. The best formulary documentation is consistent and complete, but does not include extra data outside the scope of the submission guidelines.

Professional, responsive and attentive individuals with a very good knowledge of their business needs are characteristic of the top-performing representatives.

Respondents articulated a number of characteristics of the top performing companies and their representatives:

Overall Service

Dedicated representatives
Easy to talk to
Forthcoming
Keep informed about new products, responsive, quick turn around, follow-up quickly
Help us keep up with industry standards
Good programs

Overall Service - Retail

Representatives dedicated to retail chains
Recognize the role of Pharmacy in healthcare
Grasp the role of Pharmacy as a partner
Value-added programs
Follow through with initiatives
Invest in Pharmacy
Ensure communication at retail is replicated with head office

Overall Service - Insurers

Representatives dedicated to private payers
Pre-NOC documentation for high cost drugs - time to evaluate; avoid delays in coverage
Keep informed on discontinued drugs

Best Overall Service:

Merck Frosst (8.5)
Novartis (8.3)
Pfizer (8.3)
GSK (7.8)
AstraZeneca (7.5)
Boehringer Ingelheim (7.0)

Others: Aventis, Pharmacia, Schering, Wyeth Ayerst, Eli Lilly, and Janssen Ortho

Best Communication of Product Changes:

GSK (8.5)
Janssen Ortho (8.3)
Novartis (7.6)

Others: AstraZeneca, Pfizer, Wyeth Ayerst, Schering, Merck Frosst, Aventis, Eli Lilly, Pharmascience, and Novopharm

Communication of Product Changes

Send the new monograph with an executive summary
Regular mailings with product updates
Good communication around discontinued products

Communication at Launch

Very complete information tailored to the sector -clinical data; formulary questions for payers
Send information in advance of NOC
Timeliness of information
Executive summary
Sometimes information overload
Information sometimes too detailed; need product information and cost (payer)
Avoid duplication of information

Best Communication Launch:

Wyeth Ayerst (8.7)
Novartis (8.5)
AstraZeneca (8.3)
Pfizer (8.0)
Schering (8.0)

Others: Janssen Ortho, GSK, Merck Frosst, Boehringer Ingelheim, Apotex, Novopharm, and Amgen

Formulary Submissions & Documentation

Follow submission guidelines exactly; content, quality, and quantity

Use executive summary

Submission on CD to save space; facilitate searches

A dedicated representative (Retail)

Assessment of economic impact (insurers and PBM's)

Best Formulary Submissions & Documentation:

GSK (8.5)

Merck Frosst (8.3)

AstraZeneca (7.7)

Others: Novartis, Schering, Pfizer, Boehringer Ingelheim, Aventis, Pharmacia, and Wyeth Ayerst

Most Professional Market Access Representatives:

GSK (8.8)

Pfizer (8.8)

Novartis (8.7)

AstraZeneca (8.6)

Merck Frosst (8.5)

Boehringer Ingelheim (7.8)

Others: Janssen Ortho, Schering, Aventis, Pharmacia, Wyeth Ayerst, Hoffmann-LaRoche, Bayer, Paladin, and Solvay

Professional Representatives

Knowledgeable individuals

Familiar with drug regulations

Active in the industry

Brings an economist to review impact

Excellent briefings

Accommodating, quick to respond

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