

Setting the Stage for Commercial Success in 2025 and Beyond

Strategies for pharmaceutical brand teams

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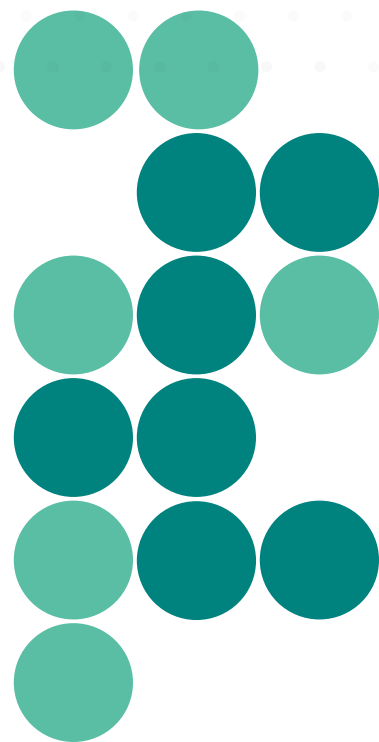


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Executive Summary



As pharmaceutical manufacturers navigate the complex commercial landscape of 2025 and beyond, they face unprecedented challenges – and opportunities. The implementation of new policies and regulations, evolving payer dynamics, and the rise of direct-to-consumer solutions are reshaping patient access to medications. The recent federal election adds another layer of incoming policy change. At the same time, both consumers and healthcare providers are demanding more personalized, digital-first experiences.

This eBook provides an in-depth guide for pharmaceutical brand teams to thrive in this evolving ecosystem. You will learn key strategies for enriching patient and healthcare provider (HCP) experiences, optimizing pharmacy services, and leveraging technology to drive commercial success. By adopting these innovative approaches, your teams can create a more integrated, efficient, and patient-centric model that not only meets the evolving needs of stakeholders, but also drives improved health outcomes and brand performance in an increasingly competitive market.

State of the Industry



Numerous changes and trends in the healthcare sector are impacting pharmaceutical manufacturers of retail and specialty-lite therapies and their patients, providers, and partners. These shifts highlight the need for brand teams to become more agile, digitally-savvy, and patient-centric in their approaches to ensuring and expanding patient access to their brands as they move into 2025.

Key Areas

Policies and Regulations

Payer Dynamics

Channel Trends

Consumer Behavior

HCP Behavior

Policies and Regulations

Inflation Reduction Act (IRA)

- Introduces significant changes to drug pricing and access, including Medicare drug negotiation¹, inflation rebates², and Part D redesign.³
- Caps out-of-pocket costs at \$2,000/year for Medicare beneficiaries starting in 2025, potentially increasing access to high-priced therapies.³

State Privacy Laws

- Multiple states have enacted comprehensive data privacy laws with varying definitions of sensitive personal information, including health data, different exemptions for HIPAA-covered entities and clinical trial data.
- Increased compliance obligations for processing sensitive personal information.⁷

Prior Authorization (PA) Reform

- Despite recent reforms at both the federal⁴ and state levels,⁵ manufacturers will likely continue to face challenges in ensuring patient access to their branded therapies in 2025.
- In 2026, payers will have 72 hours to respond to urgent PA requests and 7 calendar days for non-urgent requests.⁴

FTC Health Breach Notification Rule

- Updated rule⁸ clarifies its “applicability to health apps and other similar technologies and expanding the information that covered entities must provide to consumers when notifying them of a breach of their health data.”
- Expands the definition of “breach of security” to increase enforcement actions against health care companies with mobile applications.

Washington My Health My Data Act

- This new state law includes stronger consent-based requirements and privacy rights for consumers and features a private right of action, increasing the risk for non-compliance.
- Pharmaceutical companies are already being targeted by plaintiffs for alleged violations.⁶

CMS has already announced negotiated prices for the first 10 Part D drugs, which are expected to generate **\$6 billion in savings**¹

The IRA caps out-of-pocket costs at **\$2,000 annually** for Medicare beneficiaries starting in 2025, potentially increasing access to high-priced therapies³

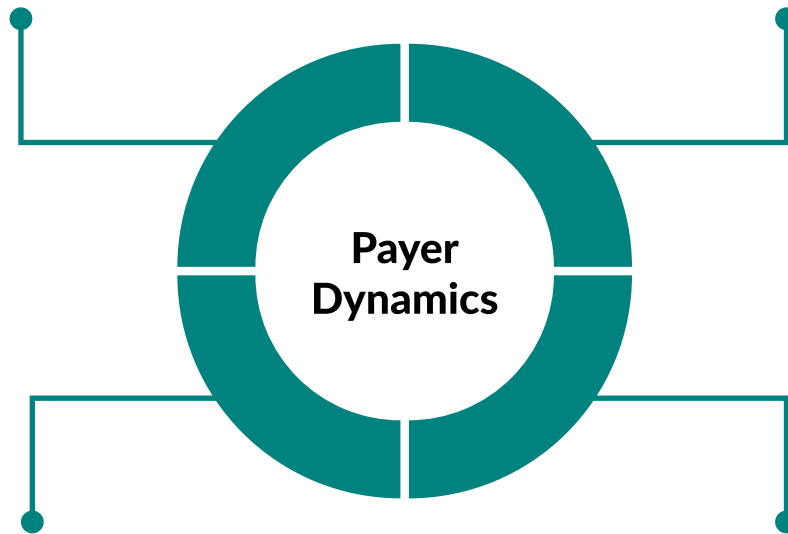
Payer Dynamics

Increased formulary control and narrowing

- Medicare Part D payers expected to exert higher levels of formulary control in preparation for 2025, when new cost distribution models shift more financial responsibility to payers.
- May result in narrower formularies, potentially limiting patient access to certain branded therapies.⁹

Shift in rebate dynamics

- Indications are that rebate walls may be coming down or lowered as net prices decrease.
- May impact how manufacturers negotiate with payers and potentially affect drug pricing strategies.⁹



Growing influence of alternative funding programs (AFPs)

- These programs can undermine patient assistance programs (PAPs) intended for uninsured patients, potentially leading to access delays and denials for some patients.¹⁰

Focus on value-based care and outcomes data

- Payers are placing greater emphasis on real-world evidence and outcomes data to inform coverage decisions.¹⁰



Over 50% of a brand's demand in its first year after launch is fully subsidized by the manufacturer in response to payer hurdles.⁹

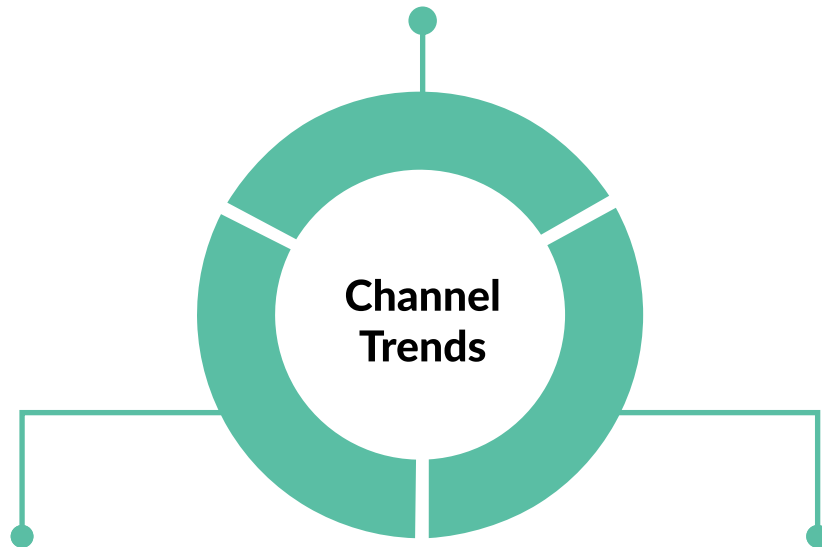


New Medicare Part D cost distribution models will shift an estimated **\$40 billion to payers** beginning in 2025.⁹

Channel Trends

Emergence of alternative care delivery models and digital health platforms

- The rise of telehealth and direct-to-consumer (DTC) health platforms is creating new channels for patient access to medications.¹¹
- Adapting patient engagement and support strategies for these new care delivery models will be essential.



Expansion of distribution models

- Novel distribution models are disrupting the traditional wholesaler distribution channel.¹²
- Specialty lite and retail brands should consider more effective distribution approaches, such as digital hub partner and [non-dispensing pharmacy](#) network, to improve access, affordability, and adherence

Continued vertical integration of pharmacy benefit managers (PBMs) and specialty pharmacies¹³

- As PBMs play an even greater role in determining patient access to medications, manufacturers will need to invest more in data analytics to better negotiate with PBMs and explore alternative pharmacy network designs.



84% of manufacturers plan to invest more in their access strategy over the next 3-5 years.¹⁰



The digital pharmacy market is expected to grow 14.4% annually, reaching a market volume of about **\$35.3 billion by 2026.**¹²

Consumer Behavior Trends

Increased focus on preventive and personalized care

- Consumers are becoming more proactive about managing their health risks and embracing prevention based on hyper-personalized insights.¹⁴

Growing adoption of digital health technologies

- Patients are increasingly comfortable using validated apps, wearables, and connected devices to monitor their health data and support health management.¹⁴



Preference for direct-to-consumer (DTC) models

- As more pharmaceutical companies [adopt DTC models](#), patients are empowered to access therapies directly through manufacturers.

More interest in value and cost-effectiveness

- Consumers are more cost-conscious in their healthcare decisions, demanding transparent pricing and proof of clinical value from pharmaceutical brands.¹⁵



The digital health market is expected to be worth around **\$427.5 billion in 2025**.¹⁶



In a 2024 telehealth satisfaction survey, respondents primarily chose telehealth for **convenience (65%), quick access to care (46%), and coverage for their condition (30%)**.¹⁷

HCP Behavior Trends

Desire for digital and personalized engagement

- Time-strapped HCPs want more tailored, digital-first interactions from pharmaceutical companies.
- Growing preference for omnichannel engagement that provides relevant information across multiple touchpoints.¹⁸



Adoption of value-based care (VBC)

- As more HCPs participate in VBC contracts, they are choosing therapies that demonstrate clear cost-effectiveness and improved patient outcomes.²⁰
- Brands that offer digital hub services to improve access to therapy, adherence, and patient engagement are more likely to enhance treatment outcomes and provide the supporting data to demonstrate this value.

Shift toward digital-first care delivery

- HCPs continue to integrate digital tools into their medical practice to make care delivery more efficient, accessible, and patient-centric.
- Top trends include telehealth, remote patient monitoring, wearable devices, interoperability solutions, and data analytics.¹⁹



Almost half of medical practices participated in some form of value-based payment contract in 2022, with an **additional 18% actively developing capabilities** to adopt this model.²¹



89% of HCPs want more personalized interactions with pharmaceutical companies, preferring tailored information delivered through digital channels.²²

Success Strategies for 2025



To thrive in today's stricter access and pricing environment, pharmaceutical brands must adopt an innovative approach to enhance patient and provider engagement and optimize pharmacy services.

9 Strategies for Enriching Patient and HCP Experiences with Your Brand

By implementing the following engagement strategies, pharmaceutical brands can create a more seamless, supportive, and value-driven experience for both patients and healthcare providers, ultimately leading to improved patient outcomes and stronger brand performance.

1. Streamline Access to Medications

Keys to successful implementation:

- Integrate services into a single [digital hub](#) (prescription management and delivery, program enrollment, benefits verification, and PA assistance)
- Offer a user-friendly patient support platform for easy medication access without delays
- Provide real-time visibility into prescription status and PA requirements
- Enable point-of-care enrollment in patient support programs

2. Enhance Affordability and Transparency

Keys to successful implementation:

- Offer real-time information on out-of-pocket costs and insurance coverage
 - Clearly communicate available financial assistance options
 - Provide tools for cost transparency at the point of prescribing
 - Develop innovative copay assistance programs
-

3. Improve Quality of Service

Keys to successful implementation:

- Utilize data analytics to optimize financial assistance processes
 - Automate prescription refills and delivery
 - Provide educational resources to maximize patient enrollment in support programs
 - Share data on patient adherence and outcomes with providers
 - Offer digital tools for medication reminders and adherence tracking
-

4. Enhance Communication and Engagement

Keys to successful implementation:

- Implement omni-channel engagement strategies with personalized content
- Provide digital communication tools (patient portals, text reminders, and digital notifications)
- Offer virtual options for HCP education and support
- Enable digital prescription services for patients
- Equip field teams with resources on patient support programs

5. Ensure Data Security and Privacy

Keys to successful implementation:

- Implement robust data encryption and security measures
 - Provide clear, easily understandable privacy policies
 - Offer patients control over their data sharing preferences
 - Ensure HIPAA compliance across all systems
-

6. Optimize Field Team Interactions

Keys to successful implementation:

- [Train field teams](#) on effectively communicating the value of hub services
 - Engage the entire medical office, not just prescribers
 - Leverage territory-level insights to track prescription trends and PA approval rates
 - Equip field reps with resources to explain patient support program benefits
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7. Simplify Prior Authorization Processes

Keys to successful implementation:

- Implement electronic PA systems integrated within existing EHR workflows
- Provide tools to help HCPs identify PA requirements quickly
- Offer support for script quality measurement, reporting, and improvement
- Monitor reimbursement data and engage prescribers to include required information

8. Enhance HCP Education and Support

Keys to successful implementation:

- Offer personalized, on-demand educational content for HCPs
 - Provide opportunities for peer-to-peer learning and collaboration
 - Support continuous medical education through digital platforms
 - Develop partnerships with digital health platforms to offer complementary services
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9. Improve Medication Adherence Tools

Keys to successful implementation:

- Offer resources for patient education on the importance of adherence
 - Provide HCPs with data on patient adherence patterns
 - Enable informed auto-refills with patient opt-in and notifications
 - Implement digital tools for medication adherence reminders
-

6 Strategies for Optimizing Your Brand's Pharmacy Services

The following strategies will help pharmaceutical brand teams create a more integrated, efficient, and patient-centric pharmacy service model that optimizes access, adherence, and overall brand performance.

1. Leverage a Managed Dispense Network

Keys to successful implementation:

- Partner with a [non-dispensing pharmacy](#) that offers high plan contract coverage to maximize reimbursement rates and patient access

- Consider integrating digital pharmacies to meet growing consumer demand for online prescription fulfillment

2. Implement Informed Auto-Refills

Keys to successful implementation:

- Develop a system that enables informed auto-refills with patient opt-in and notifications
- Use data analytics to predict refill needs and proactively engage patients
- Ensure the auto-refill process complies with regulations and respects patient preferences

3. Optimize Copay and Bridge Programs

Keys to successful implementation:

- Structure support programs so that the lowest out-of-pocket cost is only available through the digital hub
- Implement digital tools for real-time benefits verification and copay assistance eligibility checks
- Offer bridge programs to ensure continuity of care during coverage gaps or PA delays
- Monitor copay program utilization to prevent overuse and enhance GTN

4. Address Pharmacy Under-Reimbursement

Keys to successful implementation:

- Speak with an industry expert to understand the pharmacy reimbursement landscape and the potential impacts of under-reimbursement on your dispense rates
- Work with a vendor to collect and analyze your brand's reimbursement data, and enlist their support with pharmacy reimbursement coverage

5. Enhance Digital Capabilities

Keys to successful implementation:

- Implement a digital hub that integrates with electronic health records (EHRs) for seamless prescribing and enrollment
- Offer e-prescribing options with automated PA support
- Implement electronic benefit verification and real-time coverage checks at the point of care.
- Provide digital tools for patients to track their prescription status and manage refills
- Consider partnerships with digital hubs, digital health platforms, and telehealth providers

6. Improve Prior Authorization (PA) Processes

Keys to successful implementation:

- Implement an electronic PA system with pre-populated forms and a simple submission process
- Provide support for PA submissions, including dedicated staff for complex cases
- Track PA approval rates and reasons for denials to inform strategy and provider education

Using a Data-Driven Approach for Brand Success

Data and analytics are essential to helping pharmaceutical manufacturers enhance patient and provider experiences while optimizing their pharmacy services. The above strategies all require proactive data capabilities in order to make informed program decisions and optimizations.

Recommended KPIs to measure the efficacy of your program:

Patient Level	Provider Level	Program Level
<ul style="list-style-type: none">• Patient enrollment rates	<ul style="list-style-type: none">• New prescriptions sent (NRx)	<ul style="list-style-type: none">• PA requests & appeals approved and denied
<ul style="list-style-type: none">• Time to fill	<ul style="list-style-type: none">• PA submission rates	<ul style="list-style-type: none">• Coupon utilization rates
<ul style="list-style-type: none">• Adherence rates (% of refills)	<ul style="list-style-type: none">• % of scripts with correct information	<ul style="list-style-type: none">• Dispenses covered by insurance

To take these insights a layer deeper, we recommend tracking these metrics at the payer, provider, and [territory level](#) to identify improvement opportunities.

It's important to keep in mind that these program KPIs are interrelated and should ladder up to and support your broader brand strategy. By leveraging real-time data and tapping into advanced analytics, brand teams can:

- Proactively address non-adherence issues and tailor support programs to individual needs
- Demonstrate therapy value and outcomes, providing compelling evidence for payers and providers
- Track changes in prescribing behavior and territories that are generating a higher percentage of uncovered dispenses than others
- Evaluate prescriber engagement with and payer responses to PAs
- Gain insights into provider adoption and script quality to allow for targeted interventions and personalized messaging
- Understand utilization management hurdles and identify PBMs that have more obstacles to coverage than negotiated
- Identify and resolve bottlenecks to streamline the process from prescription to fulfillment
- Pinpoint areas of opportunity for field team intervention, ensuring resources are deployed where they can have the most significant impact

Staying Ahead of the Curve



Staying ahead of the curve is not just a strategic choice – it's essential to thrive in a highly competitive marketplace. Manufacturers that can navigate changes and trends strategically and proactively will be well-positioned to drive patient access to and the success of their branded therapies.

By partnering with Phil, you can help more patients get started on and adhere to treatment, simplify the PA process, and enable manufacturer-driven coupon utilization. Leveraging the PhilRx Digital Hub, your brands will gain access to a nationwide pharmacy network with 95% and above plan coverage, enabling patients to receive prescribed therapy quickly and affordably. Our real-time insights and strategic recommendations give you full visibility across the entire prescription journey to make better decisions for your patients, providers, and brands.

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