



ACTIONABLE INSIGHTS FROM THE 2017/18
National Association of Specialty Pharmacy

PATIENT SATISFACTION SURVEY

An analysis of data from pharmacies
across the industry reveals new opportunities
to improve patient satisfaction

OCTOBER 2018

NASP

**PATIENT
SURVEY**

EXECUTIVE SUMMARY

The National Association of Specialty Pharmacy (NASP) serves as the unified voice of specialty pharmacy in the U.S. and is dedicated to education, national policy advocacy, and engagement of all stakeholders in the specialty pharmacy industry. The increasingly diversified specialty pharmacy marketplace has patients, prescribers, payers, and pharmacies clamoring for statistically validated metrics which focus on consistent measurement of the quality of patient care services. Patient satisfaction surveys can be used to demonstrate a specialty pharmacy's capabilities and can be used to drive process improvements and operational enhancements. NASP strongly supports a statistically validated methodology for benchmarked patient satisfaction metrics to help our members and the patients they serve better understand and continuously improve patient satisfaction levels. In August of 2016, NASP engaged SullivanLuallin Group (SLG), a leading healthcare consulting firm, to develop a survey tool which utilizes a standard set of questions and metrics to measure performance.

This white paper outlines the findings resulting from the patient satisfaction survey conducted from July 2017 through June 2018. The survey was designed to measure key performance areas affecting **patient engagement**, which includes: **patient access to medication and pharmacist, prescription fulfillment, pharmacy/staff performance, billing, overall satisfaction and willingness to refer friends or family members**, and pertinent **demographic information**.

One of the many purposes of NASP is to identify opportunities to demonstrate the value of specialty pharmacy and help its pharmacy members improve patient satisfaction.

44.8% of the 2018 survey data came from newly participating pharmacies and 55.2% came from pharmacies participating in the 2017 survey.

Survey Process and Results

Thirteen NASP members opted to participate in the 2017/2018 NASP Patient Survey Program. All offered both U.S. Postal Service mail and email distribution delivery options. The number of surveys sent per pharmacy depended on the number of patients per pharmacy keeping in line with industry standard requirements for statistical validity.

In accordance with statistical standards, 14 disease states and 7,473 survey responses were included in the analysis. Cystic Fibrosis and Neurology joined the list this year and Urology, which appeared previously, was removed. 44.8% of the 2018 survey data came from newly participating pharmacies and 55.2% came from pharmacies participating in the 2017 survey.

The overall response rate was 17.53% which is slightly higher than the previous year (17.08%). Oncology had the highest percentage of responses at 24.03%, with the lowest response rate in Fertility/Infertility at 6.10%. The low response rates are consistent with overall healthcare survey response rates for OB/GYN and Pediatric patients. There does not appear to be any significant relationship between response rates and patients' overall rating of the specialty pharmacy.

Net Promoter Score

A net promoter score (NPS) was calculated for each of the 14 disease states using question E5 from the survey (Likelihood of recommending our pharmacy to family and friends?). Cystic Fibrosis (86.21) and Growth Hormone Deficiency (83.51) had the highest scores, while Fertility/Infertility (66.67) and IVIG/SCIG (64.83) were lowest. The data collection findings indicate the difference in scores may be attributed to the patients' relationship with the specialty pharmacy for each disease as opposed to significant variations in the level of service provided by the specialty pharmacy. This may require the implementation of a separate set of service protocols for

each disease state as the expectations of specialty pharmacy patients continue to rise.

The average NPS in the traditional pharmacy setting is 28 compared to the average 78.6 score of specialty pharmacies. While similarities between traditional and specialty pharmacies exist, the variation in NPS points to the unique value of the high-touch model offered by specialty pharmacies. Specialty pharmacies must maintain a high-touch, service-oriented approach, and staff often play a significant role in a patient's direct care team. Specialty pharmacies must also employ skilled staff with in-depth knowledge and highly specific expertise on the disease states and the patients they manage. As a result, the patient experience of a specialty pharmacy differs from that of a traditional retail pharmacy.

Survey data was collected from each of the 13 participating pharmacies. Multivariate linear regression models were developed to predict (1) E1: Our pharmacy and (2) E5: Likelihood of recommending our pharmacy to family and friends. Of the top scoring pharmacies, website utility and after-hours communication were key drivers. Additional review shows the top three performers also scored highest in these areas. This could signal a strong demand of specialty pharmacy patients to have greater access via the website or patient portal. It can also be noted that after-hours communication can also be conducted utilizing the specialty pharmacy's web page.

Of the remaining correlations, most deal with billing/insurance. One of the major industry differentiators for specialty pharmacies is their ability to provide financial resources/help to patients and therefore, their ability to excel in billing/insurance assistance is vital. Additionally, 2018 findings show that prescription coordination accounts for 50% of the key drivers followed secondly by the ability to obtain refills.

Of the top scoring pharmacies, website utility and after-hours communication were key drivers. Additional review shows the top three performers also scored highest in these areas.

Conclusion

The success of the specialty pharmacy will depend heavily on their ability to implement programs and strategies designed to address the industry's core competency, which is timely and accurate delivery of prescriptions.

It's also important that the industry understands the needs and expectations of patients by disease state to best meet their needs.

Throughout the 2018 analysis, each participating specialty pharmacy saw in their results, the opportunity to review their on-boarding process to ensure that patients were provided a clear understanding of what they can expect throughout their experience with the specialty pharmacy. Attention to setting expectations results in improvement in two very beneficial ways. First, setting expectations gives the pharmacy the greatest opportunity to meet or exceed them. Second, the exercise of reviewing the onboarding process will more likely than not, result in awareness of gaps and the discovery of ways to change and improve current processes.

Based on the data collected, the success of the specialty pharmacy will depend heavily on their ability to implement programs and strategies designed to address the industry's core competency, which is timely and accurate delivery of prescriptions. It's also important that the industry understands the needs and expectations of patients by disease state to best meet their needs.

Additionally, the industry needs to focus greater resources into implementing technology-based solutions. Technology solutions may satisfy addressing patients' increasing desire for more simplified ways to obtain prescription refills. Web based solutions will also allow specialty pharmacies to connect patients to financial resources relating to prescribed medications.

Lastly, in efforts to expand the available resources, SLG introduced two new satisfaction programs to NASP members -- the NASP Provider Survey of Specialty Pharmacy and the NASP Manufacturer Satisfaction Survey. Both programs will be offered at a negotiated reduced price to NASP corporate members.

INTRODUCTION

The National Association of Specialty Pharmacy (NASP) is a 501(c)(6) trade association representing all stakeholders in the specialty pharmacy industry. Its members include the nation's leading specialty pharmacies, pharmaceutical and biotechnology manufacturers, group purchasing organizations (GPOs), distributors, and other industry groups. NASP functions as the unified voice of specialty pharmacy in the U.S. The organization is dedicated to education, national policy advocacy, and engagement of all stakeholders in the specialty pharmacy industry.

Specialty medications account for more than one-third of all drug spend in the United States. The specialty drug pipeline has attracted new players to the specialty pharmacy space. This increasingly diversified marketplace has patients, prescribers, payers and pharmacies clamoring for statistically validated metrics which focus on consistent measurement of the quality of patient care services offered.

Patient satisfaction surveys can be used to demonstrate a specialty pharmacy's capabilities and can be used internally to drive process improvements and operational enhancements. Patient satisfaction is also a critical area of focus for pharmacy partners, including payers and pharmaceutical manufacturers.

NASP strongly supports a statistically validated methodology for benchmarked patient surveys to help our members and the patients they serve better understand and continuously improve patient satisfaction levels. Depending on the survey tool selected, it is important to consider the inherent risks. To avoid exposing unfounded weaknesses or deficiencies that are a result of the flaws of the survey tool construct rather than an indicator of the pharmacy's true performance, it is important to use a standard set of questions and metrics to measure performance.

Specialty pharmacies historically have employed a wide variety of patient satisfaction and engagement survey models and metrics, most of which were internally developed and not validated. These disparate measurement tools made it difficult for payors, manufacturers, patients and even pharmacies themselves to adequately understand and benchmark their performance against other organizations. In many cases, specialty pharmacies resorted to the creation of lengthy surveys that were time-consuming and burdensome for patients to complete.

In 2016, NASP leaders determined that a standardized survey tool was needed to set performance benchmarks in special pharmacy patient satisfaction. ... NASP engaged SullivanLuallin Group ... to develop a survey tool that would become the "gold standard" for its members.

As a result, in August 2016, NASP leaders determined that a standardized survey tool was needed to set performance benchmarks in specialty pharmacy patient satisfaction. After careful consideration of potential survey development partners, NASP engaged SullivanLuallin Group (SLG), a leading healthcare consulting firm, to develop a survey tool that would become the “gold standard” for its members.

SURVEY GOALS AND ATTRIBUTES

NASP and SLG developed the Patient Survey Program with the following goals in mind:

- Create an independent, non-biased third-party survey that would become the industry standard.
- Offer pharmacies and industry stakeholders a broad understanding of what drives patient engagement and satisfaction across the industry.
- Provide consistent satisfaction metrics and reporting required by pharmaceutical manufacturers and payor clients.
- Conduct an advanced analysis of the survey data to determine the specific drivers of patient satisfaction for each participating pharmacy, in order to help these organizations, identify opportunities to better demonstrate their industry impact, improve their patient education, and optimize their service offerings.
- Lay the foundation needed to give member pharmacies a stronger collective voice in advocacy efforts with government entities such as CMS, as well as private payors.

This survey program was also thoughtfully developed to meet the needs of participating pharmacies through the following key attributes:

- Ensure statistically sound data and standards.
- Maintain compliance with specialty pharmacy accreditation organizations.
- Utilize a standardized set of questions aligned with payors’ and manufacturers’ contractual requirements of specialty pharmacies.
- Offer a cost-effective survey solution for all pharmacies through efficiencies of bundled mailings and response data entry.
- Provide in-depth, customized analysis of survey data to each pharmacy.
- Provide for blinding of any pharmacy-specific data, to ensure that each member pharmacy’s own data will not be shared at an identifiable level.
- Secure and safeguard patient data, ensuring that all data collected and reported is also not identifiable.

OVERVIEW OF THE 2017/2018 PATIENT SURVEY

NASP and SLG conducted their first annual patient survey which was completed in the fall of 2017 and included patient responses from eight participating specialty pharmacies that had fill dates between September 2016 through June 2017. Results from that survey were released in a white paper published in September 2017. The second comprehensive patient satisfaction survey includes patients serviced during the period of July 2017 through June 2018. The survey was designed to measure key performance areas affecting **patient engagement**, which includes: **access to medication and pharmacist, prescription fulfillment, pharmacy/staff performance, billing, overall satisfaction and willingness to refer friends or family** members, and pertinent **demographic information**.

Survey Section	Key Patient Experience Areas
A. Your call to our Specialty Pharmacy	<ul style="list-style-type: none">• Phone calls answered promptly• After hours communication• Ability to return call timely• Clear communication• Prescription refills• Professionalism of the call staff• Availability of pharmacist
B. Your interaction with the Call Center	<ul style="list-style-type: none">• Courtesy of the call staff• Helpfulness of call staff• Willingness to listen• Talking time to answer questions• Amount of time spent with patient• Explaining things in a way you could understand• Instructions regarding your medication• Showing respect• Empathy and concern• Knowledge of your health condition• Knowledge of your medications
C. Our communication with you	<ul style="list-style-type: none">• Helpfulness of people assisting you with billing/insurance• Promptness in resolving billing/insurance questions• Effectiveness/helpfulness of our website
D. Your prescription	<ul style="list-style-type: none">• Timeliness of the delivery• Condition of the prescription when received• Accuracy of your filled prescription• Keeping you informed of the prescription status• Promptness in resolving issues/questions about your prescription
E. Overall satisfaction	<ul style="list-style-type: none">• Our pharmacy• Our service• Your experience with our specialty pharmacy over others• Likelihood of using this pharmacy again
F. Likelihood of recommending to family and friends (Net Promoter Score)	



Survey Process

Both U.S. Postal Service mail and email distribution options are available for the survey. Both distribution options have the goal of receiving a statistically reliable sample for each participating specialty pharmacy.

The key advantages of the email survey distribution methodology are the significant cost savings, immediate feedback and access to enhanced survey recovery options. Additionally, prior research, (DSS Research, 2000) has shown no statistically significant difference in patient responses between either methodology. This consistent and statistically viable level of survey sampling provides NASP and its members with a database that is statistically viable to represent national norms.

Distribution and Sampling

U.S. Postal Service Mail — For this option, a minimum of 2,500 surveys per participating pharmacy were mailed, with the goal of receiving 400 responses. This is in line with industry standard requirements for statistical validity. For those pharmacies with fewer than 2,500 unique patients, a census survey of all patients serviced during the survey window was conducted.

For each participating pharmacy, this process included:

- Survey targets list preparation
- Patient address file preparation
- Survey approval and production
- Survey mailing via U.S. Postal Service mail
- Survey collection
- Data entry and processing of results
- Results available via online reporting portal
- Presentation of findings

Online Patient Satisfaction Survey — For this option, participating pharmacies used SLG's eSurv® program, an electronic option for data collection, offering immediate, "real time" information and faster response to service recovery issues. Participating pharmacies could send multiple email invitations to patients.

For each participating pharmacy, this process included:

- Survey targets list preparation
- Patient email address preparation
- Survey approval and programming
- Survey invitations emailed on a weekly basis
- Access to results and comments online via online reporting portal
- Presentation of findings

Participating organizations

Thirteen NASP members opted to participate in the 2017/2018 NASP Patient Survey Program as indicated below.



Carolinas HealthCare System



UC San Diego Health



42,628
surveys sent

7,473
survey responses

14
disease states
represented

13
participating
specialty
pharmacies

ANALYSIS

A total of 7,554 non-blank surveys were received between August 2017 and September 2018, from 13 participating pharmacies. Twenty disease states were represented. Cystic Fibrosis and Neurology are new to the list this year and Urology, which appeared previously, was removed this year. In accordance with statistical standards, only disease states which had more than 30 responses were included in analysis. This reduced the number of disease states to 14, and the number of included survey responses to 7,473. Of the eligible surveys, 3,351 (44.8%) were from newly participating pharmacies and 4,122 (55.2%) from pharmacies participating in last year’s survey. The included disease states are listed alphabetically below, along with distribution and response information.

Disease State	Sent	Returned	Response Rate
Auto Immune	7,220	1,062	14.71%
Cardiology	212	48	22.64%
Cystic Fibrosis	453	32	7.06%
Fertility/Infertility	983	60	6.10%
Growth Hormone Deficiency	957	101	10.55%
Hepatitis	2,659	354	13.31%
HIV	1,767	243	13.75%
Inflammation	3,970	752	18.94%
IVIG/SCIG	721	154	21.36%
Multiple Sclerosis	2,005	414	20.65%
Neurology	385	68	17.66%
Oncology	8,756	2,104	24.03%
Other Specialty	6,424	991	15.43%
Transplant	6,116	1,090	17.82%
Total	42,628	7,473	17.53%

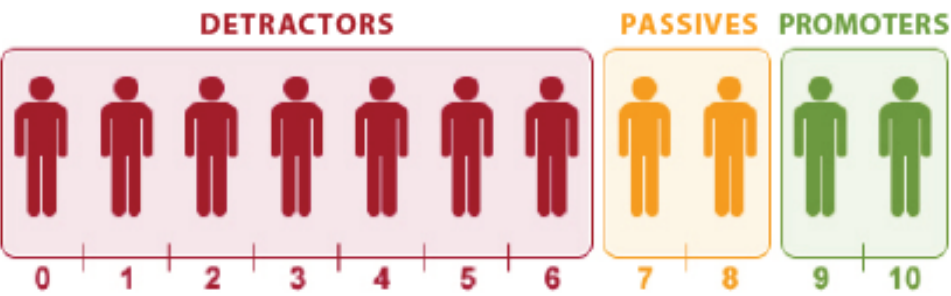
The overall response rate was 17.53% which is slightly higher than the previous year (17.08%). The low response rates associated with Fertility/Infertility and Cystic Fibrosis are consistent with overall healthcare survey response rates for OB/GYN and pediatric patients. There does not appear to be any significant relationship between response rates and patients’ overall rating of the specialty pharmacy.

Net Promoter Score by Disease State

Net Promoter Score (NPS) is a cross-industry standardized index ranging from -100 to 100 that measures the willingness of customers to recommend a company’s products or services to others. It is used to gauge the customer’s overall satisfaction with a company’s product or service and the customer’s loyalty to the brand. A net promoter score was calculated for each disease state using question E5 from the survey (Likelihood of recommending our pharmacy to family and friends?). Cystic Fibrosis (86.21) and Growth Hormone Deficiency (83.51) had the highest scores, while Fertility/Infertility (66.67) and IVIG/SCIG (64.83) were lowest. The NPS for each disease state is displayed below.

Disease State	NPS
Cystic Fibrosis	86.21
Growth Hormone Deficiency	83.51
Inflammation	80.57
Multiple Sclerosis	80.05
Oncology	80.02
Transplant	79.58
Other Specialty	78.82
Cardiology	77.78
Neurology	76.47
Auto Immune	73.26
Hepatitis	72.49
HIV	69.16
Fertility/Infertility	66.67
IVIG/SCIG	64.83

The Net Promoter Score is used to gauge the customer’s overall satisfaction with a company’s product or service and the customer’s loyalty to the brand.



Net Promoter Score = % Promoters - % Detractors

A more in-depth comparison between the three disease states with the highest scores and the three lowest performing disease states shows that for both groups, the questions with the highest scores and lowest scores were essentially the same. The table below shows that except for the condition of the prescription when received, the top performing disease states scored 5 to 7 points higher on every question.

Highest Scores	Top 3 Performers	Bottom 3 Performers	Difference
D3. Accuracy of your filled prescription	95.4	90.0	5.4
D2. Condition of the prescription when received	94.6	93.2	1.4
E4. Likelihood of using this pharmacy again?	94.5	89.4	5.1
E2. Our service	94.1	89.4	4.7
E1. Our pharmacy	93.9	87.9	6.0
A6. The professionalism of our call center staff	93.9	88.9	5.0
Lowest Scores	Top 3 Performers	Bottom 3 Performers	Difference
A2. Your ability to contact us after hours	81.8	76.0	5.8
A3. Our ability to return your calls in a timely manner	87.3	83.1	4.2
C3. Effectiveness/helpfulness of our website	88.0	81.7	6.3
B11. Knowledge of your health condition	89.5	84.0	5.5
A1. Your phone call answered promptly	90.3	85.0	5.3
E3. Your experience with our specialty pharmacy over other pharmacies you have used	90.7	83.6	7.1

Successful specialty pharmacies will need to demonstrate a strong clinical knowledge of the disease states they service, but also be able to address the needs, concerns and demands of the patients with those disease states.

To further understand what may be behind the high NPS scores for the top three performing disease states, the top four positive correlations between survey items and the net promoter question are listed below for: Cystic Fibrosis, Growth Hormone Deficiency and Inflammation. Questions are colored based on category. It is interesting to note that across the three disease states, most drivers differ significantly. For Cystic Fibrosis, the emphasis appears to be on Phone Access, Growth Hormone Deficiency on the Call Center Staff and Inflammation on Prescription Coordination.

Cystic Fibrosis	Growth Hormone Deficiency	Inflammation
<ul style="list-style-type: none">Helpfulness of people who assisted with billing / insurance (C1, r=0.295)	<ul style="list-style-type: none">Courtesy of person who took your call (B1, r=0.680)	<ul style="list-style-type: none">Promptness in resolving issues / questions concerning your prescription (D5, r=0.706)
<ul style="list-style-type: none">Your phone call answered promptly (A1, r=0.295)	<ul style="list-style-type: none">Willingness to listen carefully (B3, r=0.673)	<ul style="list-style-type: none">Your ability to obtain prescription refills (A5, r=0.628)
<ul style="list-style-type: none">Our ability to return your calls in a timely manner (A3, r=0.559)	<ul style="list-style-type: none">Helpfulness of people who assisted with billing / insurance (C1, r=0.638)	<ul style="list-style-type: none">Helpfulness of person who took your call (B2, r=0.596)
<ul style="list-style-type: none">Your ability to contact us after hours (A2, r=0.152)	<ul style="list-style-type: none">Concern for your privacy (B10, r=0.611)	<ul style="list-style-type: none">Timeliness of the delivery of your prescription (D1, r=0.595)

This would seem to indicate the difference may be attributed to the patients’ relationship with the specialty pharmacy for each disease as opposed to significant variations in the level of service provided by the specialty pharmacy. The fact that NPS is designed to understand customers’ overall connection and loyalty to a brand, understanding that this can be traced down to the individual disease state is extremely important. Successful specialty pharmacies will need to demonstrate a strong clinical knowledge of the disease states they service, but also be able to address the needs, concerns and demands of the patients with those disease states. This may require the implementation of a separate set of “service” protocols for each disease state as the expectations of specialty pharmacy patients continue to rise.

- Billing / Insurance Support
- Call Center Staff
- Prescription Coordination
- Telephone Access

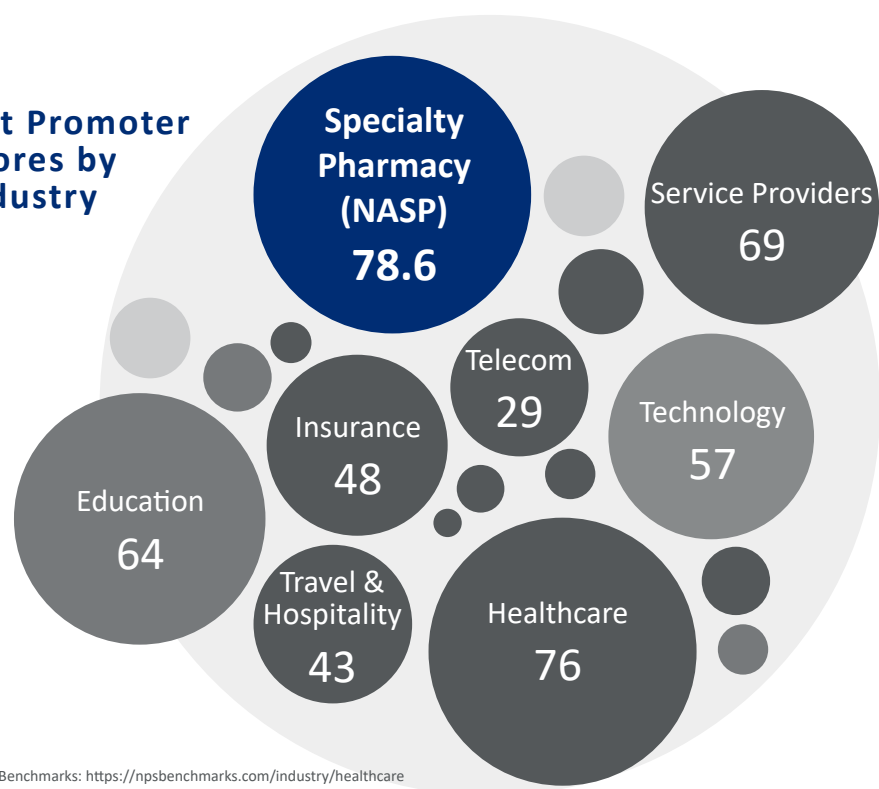
28 vs. 78.6

The average NPS in the traditional pharmacy setting is just 28 compared to the 78.6 score of specialty pharmacies.²

Net Promoter Score in the Specialty Versus Traditional Setting

A dramatic difference in NPS exists between specialty pharmacies versus traditional pharmacies. The average NPS in the traditional pharmacy setting is 28 (<https://blog.hubspot.com/service/net-promoter-score-benchmarks>) compared to the average 78.6 score of specialty pharmacies. This comparison reveals an important distinction between specialty pharmacies and traditional pharmacies that those in this sector have long understood. While traditional and specialty pharmacies have similar dispensing duties and operations, there are a number of differences between the two types of pharmacies. Specialty pharmacies must maintain a high-touch, service-oriented approach, and their staff often play a significant role in a patient's direct care team. Specialty pharmacies must also employ skilled staff with in-depth knowledge and highly specific expertise on a few select disease states such as oncology, HIV and others. As a result, the patient experience of a specialty pharmacy differs from that of a traditional retail pharmacy. The variation in NPS points to the unique value of the high-touch model offered by specialty pharmacies.

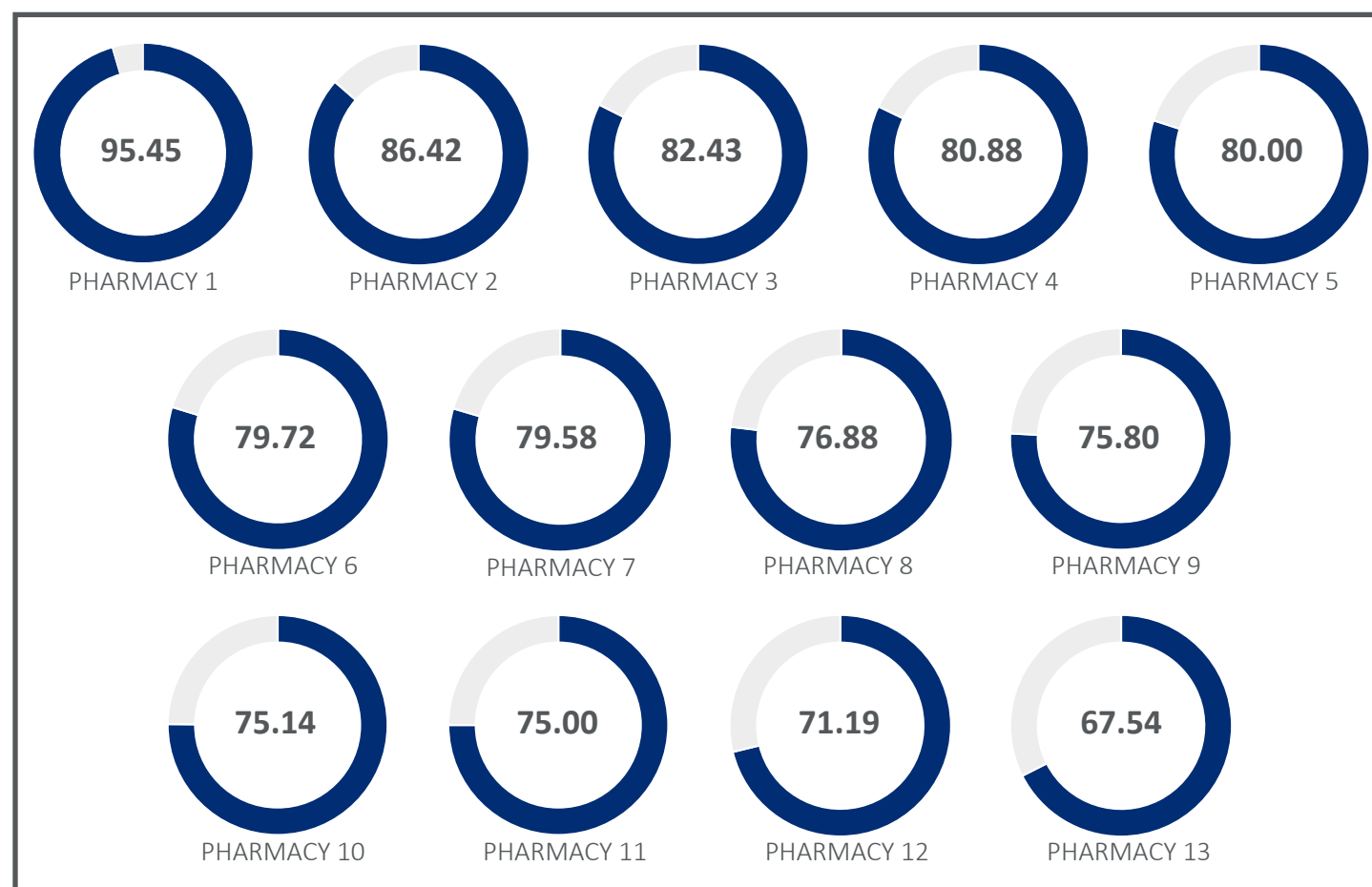
Net Promoter Scores by Industry



2. NPS Benchmarks: <https://npsbenchmarks.com/industry/healthcare>

Net Promoter Score by Pharmacy

A net promoter score was also calculated for each pharmacy that participated in the survey program, using question E5 (Likelihood of recommending our pharmacy to family and friends.) from the survey. The net promoter scores for each are displayed below.



The three pharmacies with the highest NPS values (excluding Pharmacy 1 because it received fewer than 30 responses for question E5) were selected for a correlation analysis between the net promoter question and other action items on the survey.

Pharmacy 02	Pharmacy 03	Pharmacy 04
<ul style="list-style-type: none">Helpfulness of people who assisted with billing / insurance (C1, r=0.389)Promptness in resolving billing / insurance issues (C2, r=0.386)Effectiveness / helpfulness of website (C3, r=0.385)Your ability to contact us after hours (A2, r=0.381)	<ul style="list-style-type: none">Your ability to contact us after hours (A2, r=0.495)Effectiveness / helpfulness of website (C3, r=0.467)Concern for your privacy (B10, r=0.461)Your phone call answered promptly (A1, r=0.441)	<ul style="list-style-type: none">Effectiveness / helpfulness of website (C3, r=0.663)Your ability to contact us after hours (A2, r=0.531)Helpfulness of people who assisted with billing / insurance (C1, r=0.500)Promptness in resolving prescription issues / questions (D5, r=0.478)

- Billing / Insurance Support
- Call Center Staff
- Prescription Coordination
- Telephone Access
- Website Utility

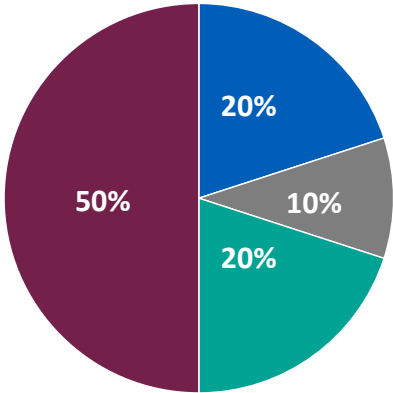
The top four positive, significant correlations between survey items and the net promoter question are listed above for pharmacies 02, 03, and 04. Questions are colored based on category. Billing/Insurance is in gray, call center staff in blue, prescription fill in purple, telephone access is noted in aqua and website utility is in gold. Items that appeared more than once have been bolded. Of note, across all three pharmacies, website utility and after-hours communication were key drivers. Additional review shows the top three performers also scored highest in these areas. This could signal a strong demand of specialty pharmacy patients to have greater access via the website or patient portal. It can also be noted that after-hours communication can also be conducted utilizing the specialty pharmacy’s web page. Of the remaining correlations, most deal with Billing/Insurance. Given the fact that one of the major industry differentiators for specialty pharmacies is their ability to provide financial resources/help to patients, their ability to excel in billing/insurance assistance is vital.

Key drivers of overall satisfaction and likelihood to recommend

To better understand which aspects of the patient experience lead to both higher overall satisfaction and referrals, multivariate linear regression models were developed to predict (1) E1: Our pharmacy and (2) E5: Likelihood of recommending our pharmacy to family and friends. The survey items that are most predictive of the key outcome questions studied are listed below.

Overall Satisfaction	Likelihood of Recommending
<ul style="list-style-type: none">Your ability to obtain prescription refillsPromptness in resolving issues / questions concerning your prescriptionTimeliness of the delivery of your prescriptionHelpfulness of the people who assisted you with billing / insuranceAccuracy of the filled prescription	<ul style="list-style-type: none">The helpfulness of the person who took your callEmpathy and concern for your needsYour ability to obtain prescription refillsTimeliness of the delivery of your prescriptionPromptness in resolving issues / questions concerning your prescription

- Billing / Insurance Support
- Call Center Staff
- Prescription Coordination
- Telephone Access



When we compare this to last year’s findings, where call center staff accounted for 50% of the key drivers and prescription coordination was a strong second at 34%. This year prescription coordination accounts for 50% of the key drivers followed by the ability to obtain refills and call center staff, each accounting for 20%, and billing/insurance support with 10%.

Ensuring a strong understanding of the disease state by the team that services patients with specific conditions will become more important as expectations of patients continue to rise.

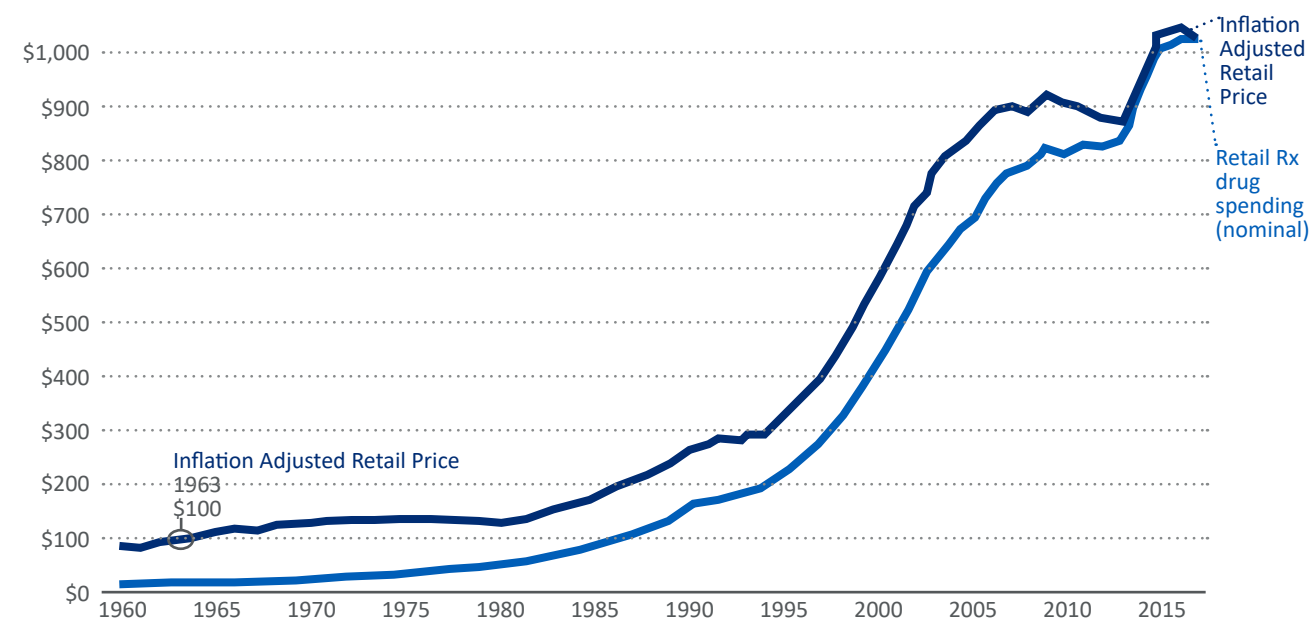
LOOKING AHEAD (SUCCESS IN 2019)

It is clear from the analysis that a key driver of success for specialty pharmacies will be their ability to implement programs and strategies designed to address the industry's core competency, which is timely and accurate delivery of prescriptions. This may require looking for new and different ways to improve performance. As noted in the discussion on key drivers by disease state above, it appears that an in-depth look at how the industry understands the needs and expectations of patients by disease state may be necessary to know how best to meet their needs. Ensuring a strong understanding of the disease state by the team that services patients with specific conditions will become more important as expectations of patients continue to rise. Additionally, it is clear the industry needs to focus greater resources into implementing technology-based solutions. Improved access to pharmacy staff and shipment information can be in the form of smart phone application development, enhanced website usability and direct online interfaces.

The survey findings will also be significant when addressing patients' increasing desire for more direct and simplified ways to obtain prescription refills. This complex issue not only varies by disease state but is often encumbered by regulatory and payor requirements. It is our recommendation to begin a new study to look into these barriers designed to evaluate the impact of such challenges on patient care.

One of the key differentiators for the specialty pharmacy industry is its focus on connecting patients to invaluable financial resources for their prescribed medications. Spending on prescription drugs has risen rapidly over the past decade, and there is no indication that this steep rise will not continue for the foreseeable future.

Nominal and Inflation-Adjusted per Capital Spending on Retail Prescription Drugs, 1900-2017



Source: Kaiser Family Foundation Analysis of National Health Expenditures Account

Like above, technology may provide success in this area; specialty pharmacies may want to explore opportunities with both payors and manufacturers to develop web-based solutions to more quickly and accurately address the needs of patients. This could also improve relations with providers who often look to specialty pharmacies for pre-authorization support and financial assistance for their patients.

In conclusion, it is important to remember that ALL dissatisfaction is the result of unmet expectations. Throughout the analysis, we see how this has played out; each participating specialty pharmacy saw in their results, the opportunity to review their on-boarding process to ensure that patients were provided a clear understanding of what they can expect throughout their experience with the specialty pharmacy. Attention to setting expectations results in improvement in two very beneficial ways. First, setting expectations gives the pharmacy the greatest opportunity to meet or exceed them. Second, the exercise of reviewing the onboarding process will more likely than not, result in awareness of gaps and the discovery of ways to change and improve current processes.

In conclusion, it is important to remember that ALL dissatisfaction is the result of unmet expectations.

About SullivanLuallin Group

SLG has more than three decades of experience in serving provider networks, physician practices and healthcare organizations across the continuum of care. The company provides a full range of services designed to transform the patient experience, including patient satisfaction and engagement surveys, employee focus groups, physician surveys and many other data-driven initiatives. As patient experience consultants, SLG helps healthcare organizations convert their baseline survey findings into practical action plans that produce immediate improvement and ongoing results.

To learn more, please visit <https://sullivanluallingroup.com/assess/nasp/> or contact SLG at **619.283.8988**.

Introducing New NASP Survey Programs

NASP PROVIDER Survey of Specialty Pharmacy Services:

SLG now offers NASP Corporate Members the opportunity, at a negotiated reduced price, to conduct a provider survey of specialty pharmacy services using the same distribution scope as the patient survey – U.S. Postal Service mail or electronic email.

NASP MANUFACTURER Satisfaction Survey:

SLG recently collaborated with NASP to develop a Manufacturer Satisfaction Survey for participating NASP members. SLG will administer, at a negotiated reduced price, a survey of pharmaceutical manufacturer satisfaction using the eSurv: Online Patient Satisfaction Survey. To accommodate typical manufacturer volumes, SLG will process and send unlimited email invitations per reporting business unit either annually, biannually, or quarterly.



**NATIONAL ASSOCIATION OF
SPECIALTY PHARMACY**