

Areas of Growth

Going beyond Distribution

„We listen to our patients and customer to ensure we bring the right products and services to the right people, at the right time.“

Italy

Consumer & product insights



McKesson Case Studies Italy

Situation

Target

Action

Result

- **Pain:** 67,3% of people in Italy suffer of Chronic Pain
- **Hypertension:** 61,6% of people don't follow their therapy
- **Respiratory:** 12,5% of people suffer of COPD and Asthma



McKesson Case Studies Italy

Situation

Target

Action

Result

Develop projects in LloydsFarmacia to become key reference point for customers in

- Pain
- Hypertension
- Respiratory



McKesson Case Studies Italy

Situation

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Activate patients:

- Dedicated communication for Fidelity Card holders (100k customers contacts): Information that expert pharmacists are available in Lloyds Pharmacies for first advice
- Events Days IN and OUT of Pharmacies with pathology expert: “Camper Tour” where Pharmacists meet citizens out of the Pharmacy in major squares
- Online and Social Media communication: Patients area where expert pharmacists offer advice to aid patient adherence
- “Farmaviso”: innovative service providing patient alerts to aid patient adherence via SMS or phone call (activated by pharmacist)
- “Farmavie” : app to identify Lloyds Pharmacies offering this adherence service

Activate Pharmacies & GPs:

- Pharmacy targeting through data analysis & training
- Full engagement of local GP's in the project: pharmacy - GP's - patient



McKesson Case Studies Italy



Supplier A in pain project:

- ✓ Maintain quotas for branded products vs Gx competition, weight of product A in Lloyds 97% vs. mkt 95%

Supplier B in hypertension project:

- ✓ Maintain quotas for branded products vs Gx, Sales growth of Bx products +10% vs Mkt - 14%

Supplier C in pain project:

- ✓ Increase the sell-out of difficult availability products in own pharmacies (+ 33,28% of sales)

Supplier D in respiratory project:

- ✓ Increase the sell-out of difficult availability products in own pharmacies (+95% of sales)

Number of training events:

- ✓ 5 days of training and around 300 pharmacists trained per project

Number of GPs involved:

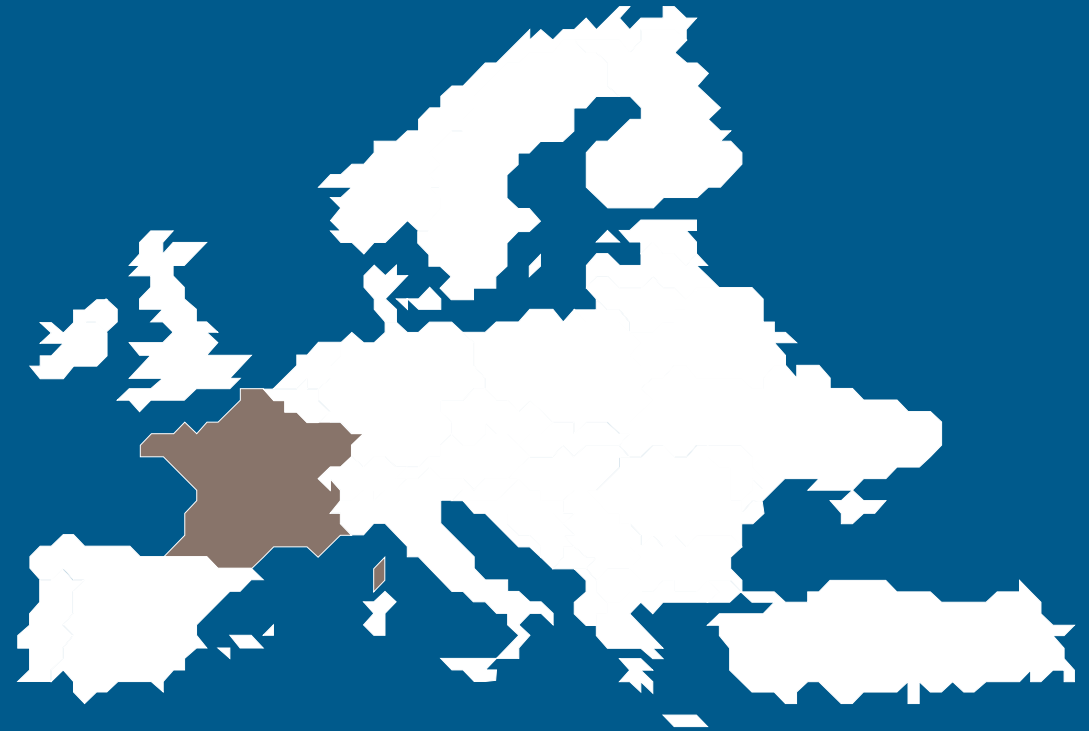
- ✓ Lloyds' Pharmacists visited over 400 GP's to present the projects

+ % of recommendation vs. markets:

- ✓ Depending on supplier requests, average growth is around 30% (from 10% to 138%)

France

Immunisation



Immunisation - Awareness France

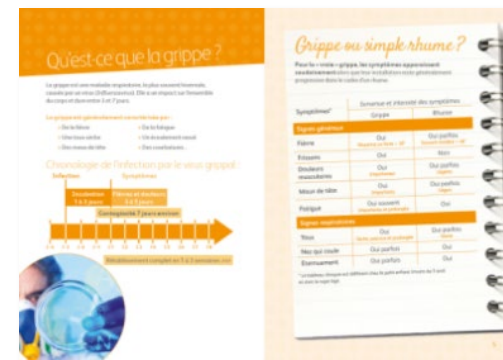
Situation

Target

Action

Result

- Create awareness of pathology and vaccine recommendation (flu, prevent cervical cancer) via annual campaign in partnership with industry partners
- Improve the vaccination rate among the target population (> 65 years) maximizing the referral capacity of the pharmacist



Immunisation – Cervical Cancer France

Situation

Target

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Result

“Spot santé”

- Awareness via call-centre hotline hold message
- 25/30 second message
- Co-admin with flu vaccine possible
- Message heard 40 620 times by 9 384 OCP pharmacies



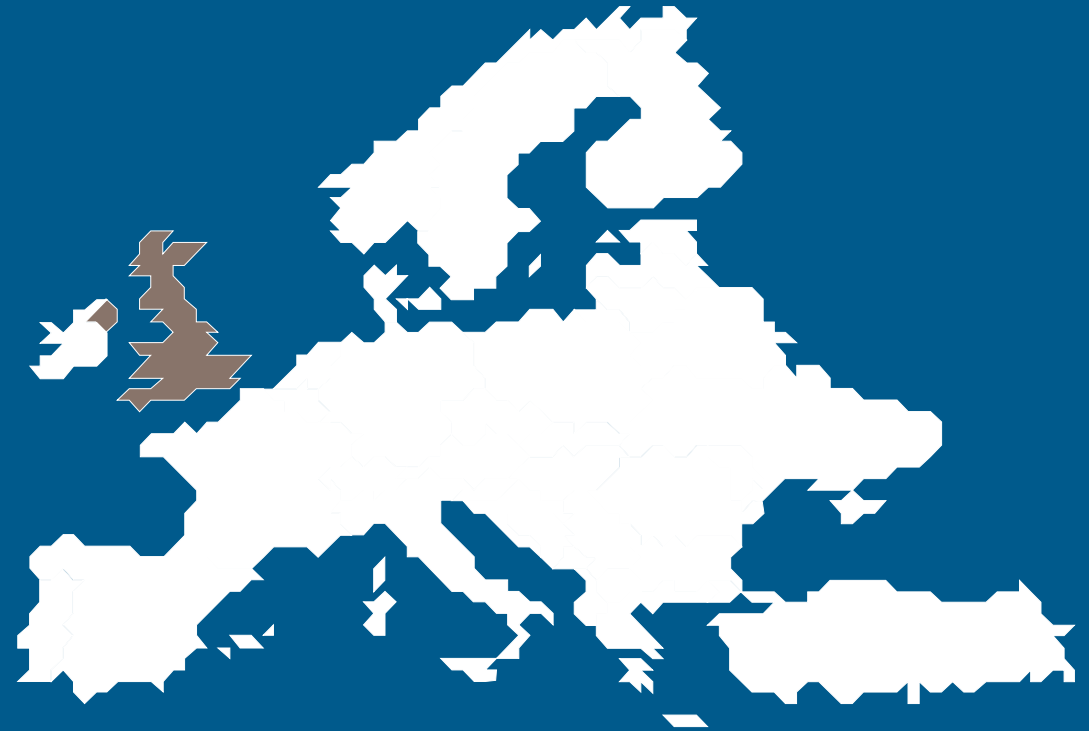
InfoFlash

- Information for the pharmacy team
- Dedicated information on zona and prevention
- 22 000 pharmacies reach



United Kingdom

Consumer & Product insight



Market, Product and Patient Insight

Informatics UK

Situation

Target

Action

Result

Market Insight Proposition

Why would you use McKesson to help with market analysis?

- If you are bringing a new drug to market, or want to understand drug usage and where your opportunities are
- Analyse the effectiveness of recent product launch or campaign through dispensing data
- Analyse persistence and adherence to therapy following new initiation to product
- Understand changes for patients already on therapy and new to therapy, or new indications

McKesson Expertise to

- Analyse competitor and market medication usage
- Profile your market demographics
- Identify geographic opportunities

All Through

- Analysis of 1.800 LloydsPharmacy branches
- 330 million prescription lines' records
- 13 million patients including 9.6 million repeat prescription records

Real time data availability
48 hours after dispensing

Market, Product and Patient Insight Informatics UK

Situation

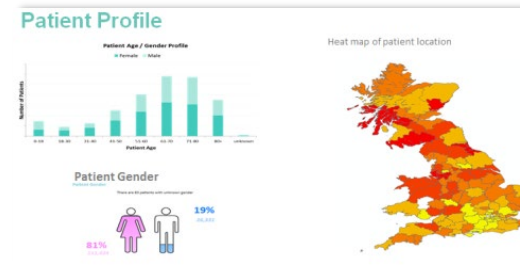
Target

Action

Result

We can provide you with highly valuable analysis of **dispensing data and tailored reports**:

- Data analysis from national level down to NHS area teams, CCGs or Health Board as well as at individual store level and postcode geographies
- Patient profiling via heat map (variables are demographics, geographies, share, growth, competitive product analysis, patient movement)
- Adherence reports in various indications
- Pre-prescription awareness
- Post-prescription support



Market insight proposition to:

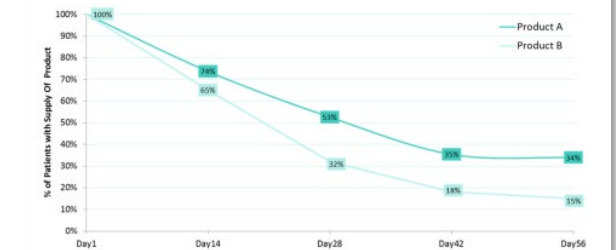
- Help with your strategic and tactical decision making
- Use real life data to develop and design patient support initiatives
- Enhance the way you implement your strategy through a targeted approach
- Inform your marketing investment decisions
- Help engage prescribers and payers to increase market access

Adherence – Proportion Of Days Covered

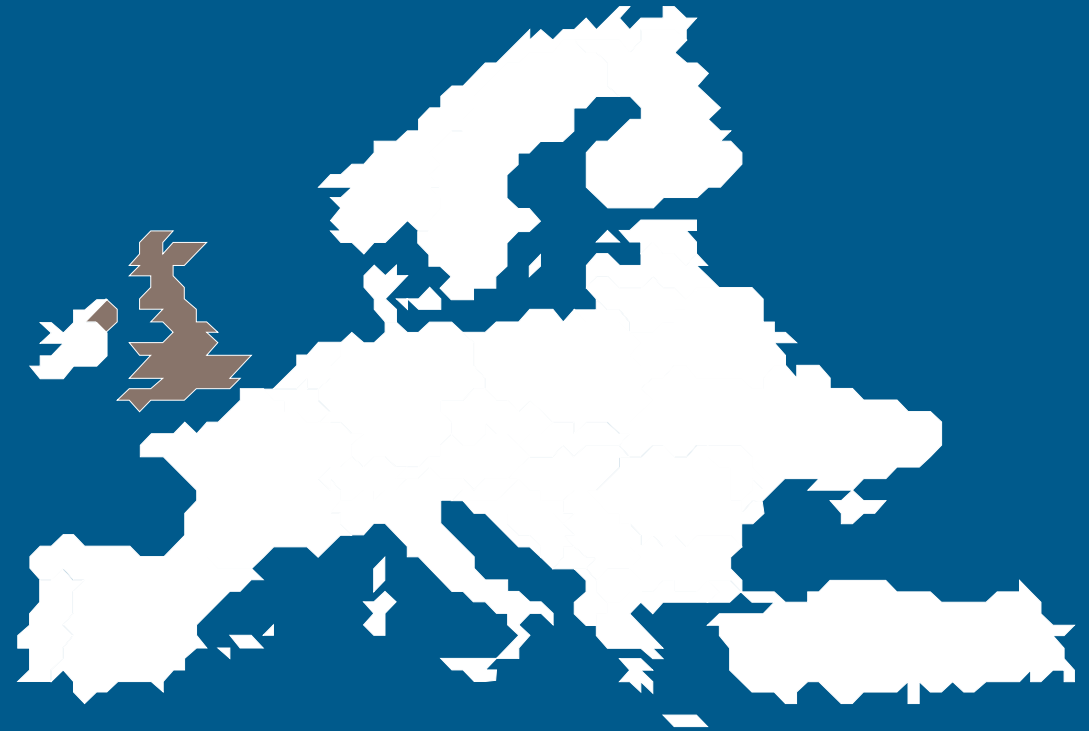
	Product A		Product B	
	No. Patients	% Patients	No. Patients	% Patients
High PDC > 80%	1000	48%	1500	79%
Medium PDC 50-80%	800	38%	300	16%
Low PDC <50%	300	14%	100	5%
Average PDC for cohort		71.2%		82.6%

Product Switch A to B		Product A			Total
		high	med	low	
Product B	high	458	368	55	881
	med	164	23	2	189
	low	33	22	10	65
Total		655	413	67	1,135

Persistence



United Kingdom Malnutrition



Malnutrition

UK



- Malnutrition costs the NHS £19.6bn per annum
- 3 million people are at risk of disease related malnutrition
- 1 in 3 elderly people are at risk of malnutrition
- NICE Guidelines and The Malnutrition Pathway recommendations depend on the patient condition: prescribing can vary between 4-6 or 12 weeks
- Pharmaco Market research in Primary Care shows there is a 50 - 55% drop off rate of patients from collecting a prescription of Oral Nutritional Supplements at month 1 to patients returning for the 2nd script at start of month 2

Malnutrition UK

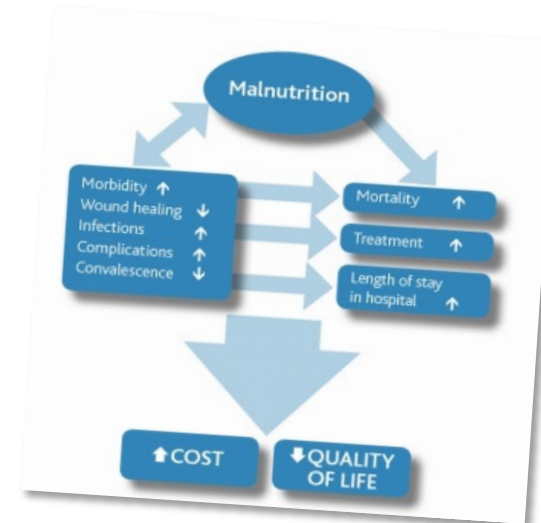
Situation

Target

Action

Result

- Identification of current consumption and discontinuation rate on Pharmaco Adult ONS products
- Gain insight into the consumption and adherence behaviour of patients and carers and reasons for not persisting or adhering with treatment
- Understand the potential role pharmacists can play in the patient journey
- Develop a PSP programme based on the results of the data and patient insight



Malnutrition UK



STAGE 1

- Analysis of Lloyds dispensing data (verify Pharmaco Market research, affirm the discontinuation rate using the most recent 6 month data)
- Calculate the average persistence rate for patients on two product ranges and identify any other barriers to persistence

STAGE 2

- A Discontinuation Evaluation Service was designed by McKesson and conducted by Pharmacists from Lloyds Pharmacy. Patients who had consented to be contacted were telephoned for a 30 minute intervention about their ONS treatment.

STAGE 3

- Face to face interviews were conducted with patients who had already been interviewed by phone and agreed to participate in a more in-depth discussion of 1-2 hours

STAGE 4

- Pharmacist focus groups were held in two areas of the country for Pharmaco to get a better understanding of their role and opinions regarding malnourished patients and the role patient support could provide

Malnutrition UK



- ✓ **Consumption** and **discontinuation rate** calculated from **1.6m** prescriptions dispensed over 6 month period
- ✓ **Consumption** and **adherence behavior** insights from **13K** patients identified for dispensing analysis
- ✓ **Understand role of pharmacist and PSP development**
 - 50** patients interviewed by phone,
 - 12** face to face interviews undertaken at patients home,
 - 10** pharmacists in focus groups, final report and recommendation
- ✓ **6** months PSP designed by LLP - to be delivered in Lloyds Pharmacy and Sainsbury's stores in the Cambridgeshire area from May 2017 together with NHS
- ✓ One year **funding of full time account manager** to develop further services

Synergies

