

# The NHS Evolution to Integrated Care

How can pharma succeed within an  
integrated commissioning landscape?



# “Moving to Integrated Care Systems everywhere”

“By April 2021 Integrated Care Systems will cover the whole country”  
(NHS Long Term Plan, January 2019).

From the initial announcement of Accountable Care Systems in Next Steps on the NHS Five Year Forward View (2015) to the roll-out of the renamed Integrated Care Systems (ICSs), progress has been impressive.

Three new areas were announced as ICSs in June 2019 and NHS England has funded a £2million programme to help 23 areas kick-start or boost ICS leadership development activities.

So, as Sustainability and Transformation Partnerships (STPs) rapidly morph into ICSs, and healthcare commissioning becomes more strategic – how can pharma ensure the successful marketing of its brands?

“ Our aim is to use the next several years to make the biggest national move to integrated care of any major western country ”

(NHS England, 2017)

# Succeeding in an integrated commissioning landscape

How commissioning will change in the wake of ICSs remains to be clearly seen, but commissioners will undoubtedly need to take a more strategic role and a longer-term view – with their focus shifting to defining and measuring outcomes, establishing capitated budgets, and using longer-term contracts and more stringent service level agreements.

Every ICS will need streamlined commissioning arrangements to enable a single set of commissioning decisions at system level. This will typically involve a single CCG for each ICS area.

Through ICSs, commissioners will make shared decisions with providers on population health, service redesign and Long Term Plan implementation.

Formularies may be ICS-wide with one committee making the decisions for the whole territory and powerful NHS Trusts will become key organisations for market access. Whilst opportunities for larger scale deals may result from this larger footprint, the flip-side is that pharma also risks a rapid reduction in market share if unsuccessful.

What is sure is that pharmaceutical companies have a critical and unique role to play in the development of ICSs, with the new value-based environment calling for a greater emphasis and a longer-term view on pharmaceutical management.

# Moving away from a product- centric mindset

The changes required by ICSs will certainly go 'beyond the pill', with pharma needing to show healthcare decision-makers how their brand adds value to patients. This will involve offering wider packages of care that the market is willing to pay a premium for, and which they perceive as having 'value'.

# Knowledge is power

Here are Triducive's 10 top tips on how pharma can maximise opportunities and succeed within this new integrated commissioning landscape.

1

## Find out who is driving the changes in your area

Clinicians are not in the driving seat regarding ICSs; it's senior managers that have the best overview of what the future will look like. Find out who is driving change in your area and secure meetings – make sure they are structured, relevant and well-prepared. This will help to gather insight on trends, gaps or inefficiencies in patient care in a variety of priority and non-priority disease areas. Having an early seat at the table with these decision-makers will help establish beneficial relationships going forward.

2

## Develop integrated care pathways to reflect the new structure

The NHS will be looking to develop new care pathways to reflect its new structure and make the most of integrated resources.

A survey carried out by the European Pathway Association found that integrated care pathways are being used in two ways: as a multi-disciplinary tool to improve the quality and efficiency of evidence-based care, and as a communication tool between professionals to manage and standardise outcome-oriented care.<sup>1</sup>

Providing care in the lowest intensity setting to reduce costs will be a priority, as will developing the pathways alongside patients. Understand where, why and how your brand fits in the local care pathway.

<sup>1</sup> European Pathway Association, Prevalence and use of clinical pathways in 23 countries: an international survey. Journal of Integrated Care Pathways, 2006.

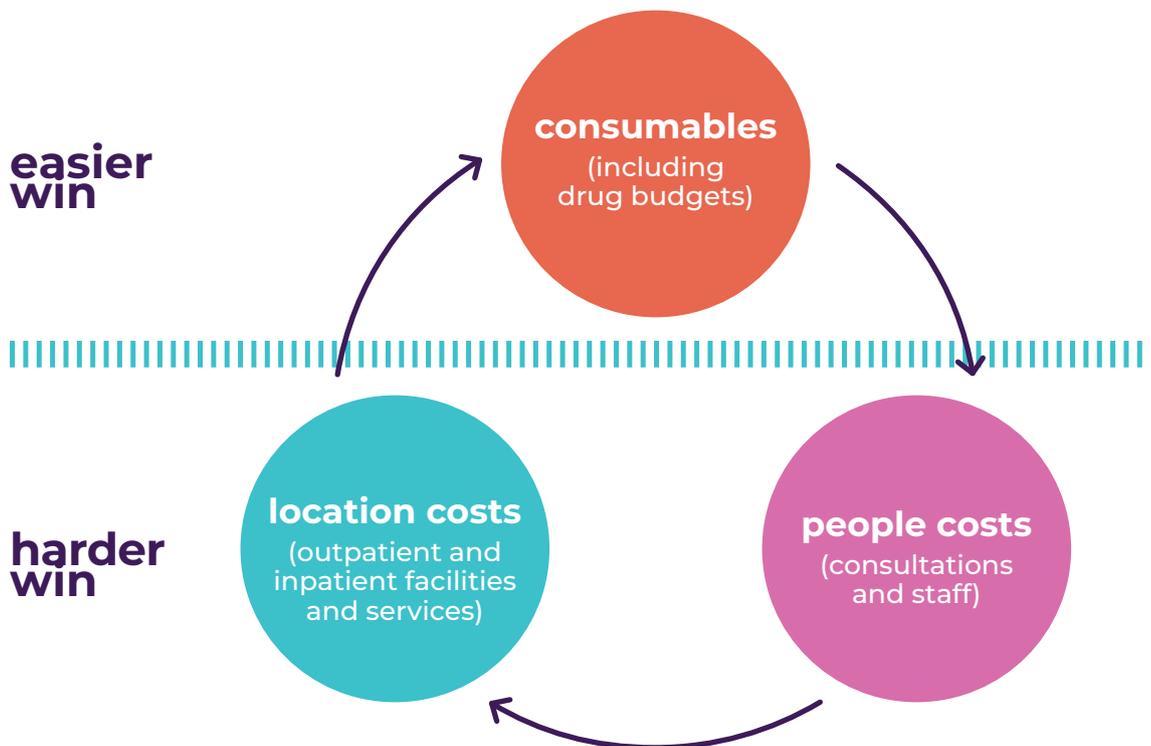
### 3 Align your brand's value story to resource allocation

The new ICS model is resulting in new people, roles and pathways, and brand propositions need to reflect this. Value narratives need to mirror the rapidly changing priorities of this new audience and highlight how finite NHS resources can be best allocated.

Medicine management tends to just look at intervention (consumable) costs whereas commissioning (and custodians of the System Control Budget) see the costs of care as falling into three categories: consumables, location costs and people costs.

Pharma has the opportunity to support ICSs to define the optimum patient journey that ensures all appropriate steps (such as resource allocation modelling) are taken and effectively implemented, while objectively and defensibly reducing unnecessary staff or location costs.

#### The costs of care are broader than just drug budgets



## 4

### **Be flexible**

There is huge variation across different ICSs, and the pace of change is rapid.

Market access teams are working within a landscape filled with great uncertainty, and information is often sparse. Make sure you're the first ones to see the information – websites, meetings and documents – that will gradually become available.

Knowledge is power, and this information will help inform your engagements. Be ready to respond rapidly and ensure teams are well supported and given time and flexibility to tailor for their locality.

## 5

### **Show how resources can be used more effectively**

While it is hoped that the ICS model will save the NHS money, the rhetoric focuses on enabling resources to be used more effectively, so make sure your narrative matches this.

## 6

### **Don't see social prescribing as competition**

ICSs bring together local organisations to deliver the 'triple integration'<sup>2</sup> of primary and specialist care, physical and mental health services, and health with social care. Delivering on wider health benefits for patients is key. Social prescribing is part of this package and the benefits are clear. Ensure your brand propositions complement this wider package of care.

## 7

### **Don't just focus on cost-effectiveness**

While ICSs will continue to look for cost-effectiveness, they will not be solely informed by health economics. Instead, ICSs have a heavier focus on quality and resource allocation because their financial rewards (and future sustainability) depend on their ability to meet certain quality metrics.

## 8

### **Take a preventative approach**

ICS metrics have a heavier focus on prevention. Emphasise the preventative elements of therapies in business cases and if possible show how they can support people to live healthier lives.

Providing data is key to this more preventative approach and an area where pharma can assist.

<sup>2</sup> NHS, The NHS Five Year Forward View, 2014.

## 9 Differentiate

Meaningful clinical and budget impact differential is difficult for pharmaceutical manufacturers to achieve quickly. The role of branding has its place, but differentiating how you engage with ICSs will help to drive brand access.

Being relevant and appropriate can be a huge differentiator compared to competitors who place a superficial emphasis on ICS engagement.

Extensive joint working initiatives may be ambitious in the short-term with many ICSs in very early stages of development, however positioning your brand as a credible solution in your given therapy area is vital for developing future relationships.

## 10 Communicate simple and coherent value

There is an opportunity to align brand messages in a simple and clear way, and a deep, confident understanding of the audience will help achieve this. Communication should not solely be about being understood, but rather avoiding being misunderstood. Align your brand messages across clinical and non-clinical audiences and have a clear and specific call-to-action.

# Experiment to innovate

The lack of a clear blueprint for integrated care means that systems are able to experiment with new ways of working to deliver care, allowing them the freedom and flexibility to innovate.

While this change in structural status quo creates a level of uncertainty for pharma, proactive companies are riding the changes and moving beyond being just a supplier of products and shifting into the role of partner, sharing risk and data to drive successful health outcomes.

Partner organisations and their leaders are working more collaboratively in a way that was not happening previously.

The priority now is for ICSs to start making - and measuring - tangible improvements in services and outcomes, which provides a good engagement opportunity for pharma. Communicating to newly emerging stakeholders in an authentic way will drive trust, affinity and loyalty, both throughout this time of change, and into the future.

“ Proactive companies are riding the changes and moving beyond being just a supplier of products ”

**Triducive is a Strategy & Value Consultancy for the healthcare sector. Since 2009, we've provided expert and practical solutions that strengthen and realise true brand value, for successful access. We work with brand leaders facing differentiation challenges.**

To further discuss the issues in this paper or to organise a meeting with Triducive to talk about your wider brand value challenges, contact us on: **+44 (0)7947 130 425** or email [info@triducive.co.uk](mailto:info@triducive.co.uk)

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