

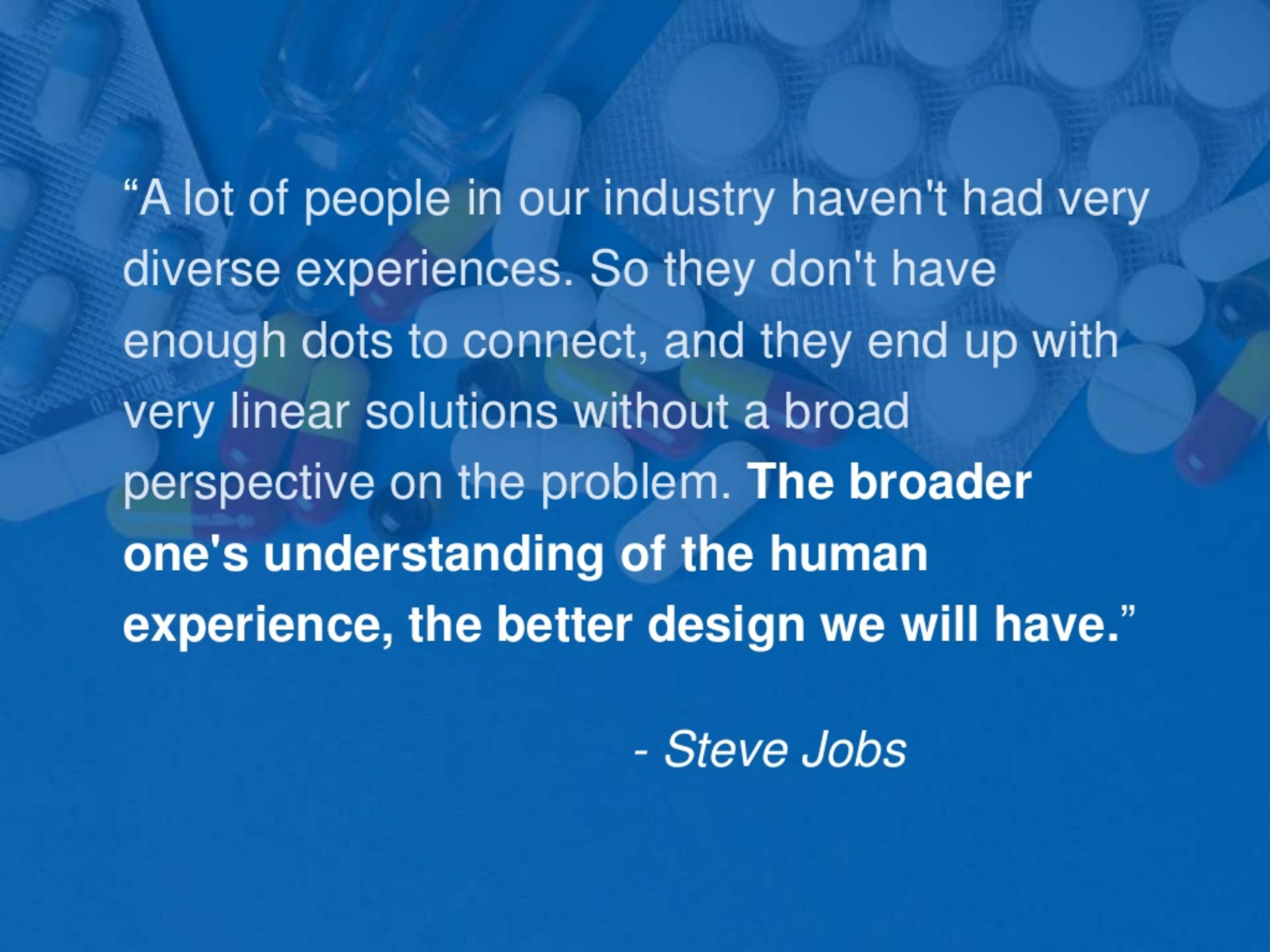
Specialty Pharmacy:

Connecting the Healthcare Industry

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“A lot of people in our industry haven't had very diverse experiences. So they don't have enough dots to connect, and they end up with very linear solutions without a broad perspective on the problem. **The broader one's understanding of the human experience, the better design we will have.**”

- *Steve Jobs*

Current Forces in Healthcare



"Minute clinics"



Primary care office



Specialist office



Hospital



Outpatient



Home health



Hospice

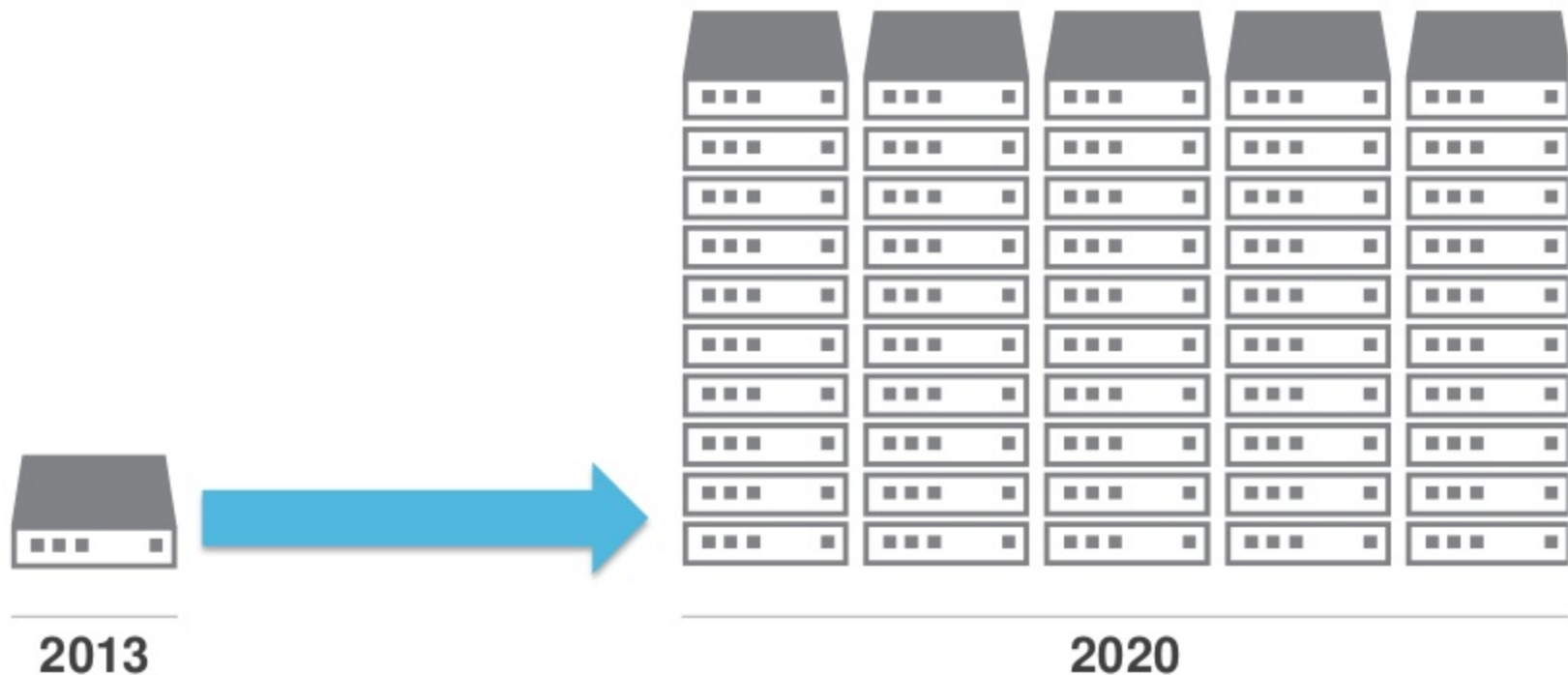


Retail pharmacy



Specialty pharmacy

Explosive Growth in Healthcare Data



The healthcare industry is experiencing explosive growth in data: **from 500 petabytes in 2013 to 25,000 petabytes by 2020.**

 = 500 Petabytes

Source: <http://hin.com/blog/2013/12/24/infographic-storing-healthcare-data/>

Physicians are Going Mobile



Doctors are 250% more likely to own a tablet
than other consumers



66% of doctors use a tablet for medical purposes



More than 50% of doctors using a mobile device report that they aid in decision-making



40% report decreases in administration time due to mobile device usage

Source: <http://www.totalassist.com/infographic-healthcare-mobility-doctors-250-likely-tablet/>

Silo Innovation May not Work



**Harvard
Business
Review**

#1 Innovation: Checklists

Hospitals will require health care providers to follow strict protocols for procedures that benefit from routinization—from preparing a patient for surgery to inserting a central line.

“Ten Innovations That Will Transform Medicine”



The NEW ENGLAND
JOURNAL of MEDICINE

“Researchers found no significant drop in complication or mortality rates in the three months after the adoption of checklists.”

ΣΚΕΨΟΥ

THINK



\$24,000

Who is Stoker?
(FOR ONE WELCOME OUR
NEW COMPUTER OVERLORDS)

\$1,000

\$77,147

Who is Bram
Stoker?

\$17,973

\$21,600

WHO IS
BRAM STOKER?

\$5600

What Watson is Doing Now





By 2016, **8 out of the top 10** branded pharmaceuticals in the U.S. will be specialty medications.



One Tap to Ride:

Uber uses your phone's GPS to detect your location and connects you with the nearest available driver. Get picked up anywhere — even if you don't know the exact address.

Cashless & Convenient:

You don't need cash when you ride with Uber. Once you arrive at your destination, your fare is automatically charged to your credit card on file — no need to tip. We'll also e-mail you a receipt.

What Specialty Stakeholders Want

Integrated Care

- Pharmacy & Medical Benefit
- Administrative efficiencies
- Web based technology interfaces with protected PHI

Patient Access and Empowerment

- Physicians, nurses, medical assistants, practice managers and other staff that influence what specialty pharmacy is used by the patient.

Documented Quality

- Best Practices Clinical & Formulary Management
- Patient & Provider Network Satisfaction
- Documented Comparative Outcomes

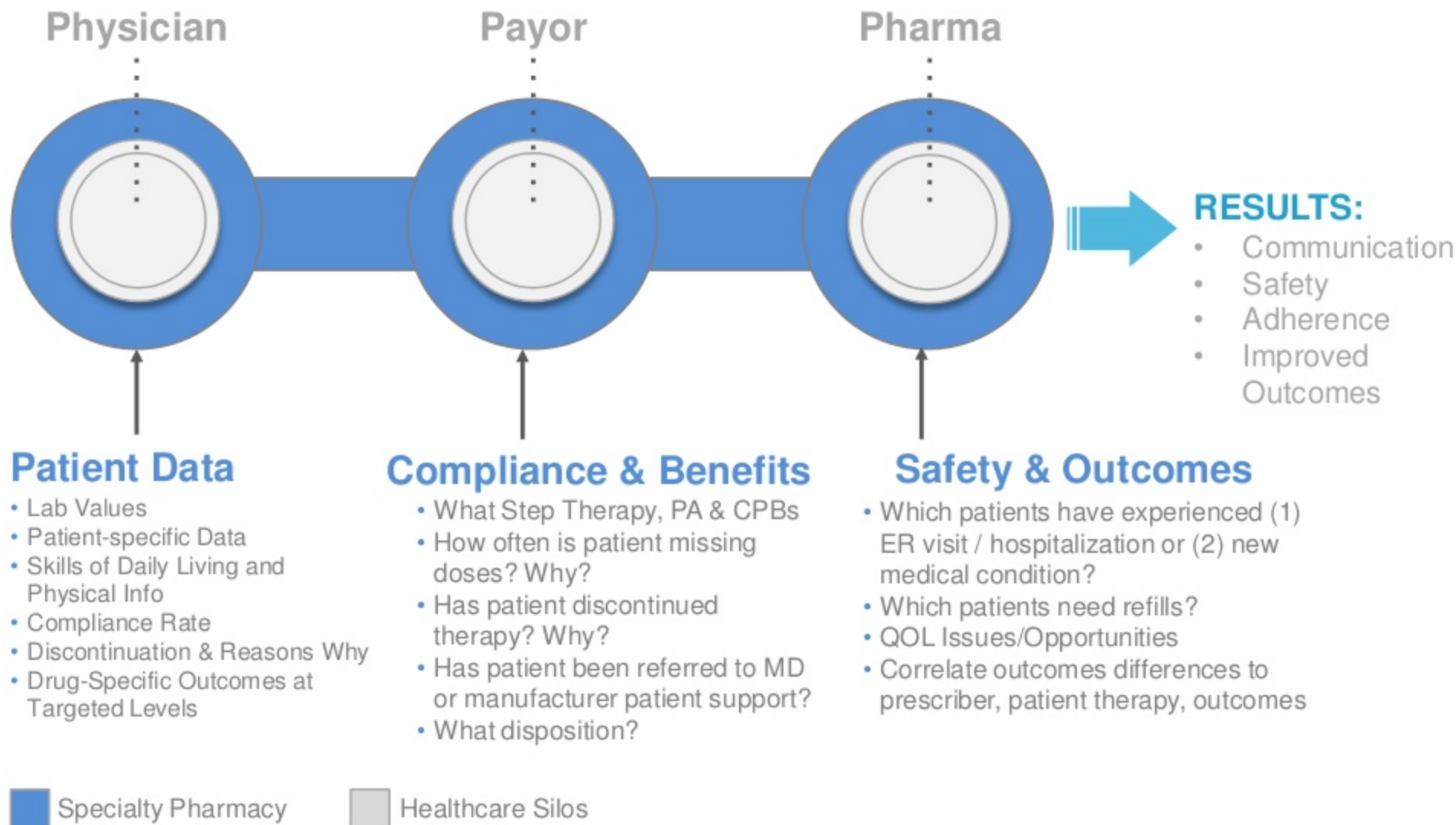
Predictable Costs

- Value based health care
- Bending the cost curve

The background of the slide features a low-angle, upward-looking perspective of several large, cylindrical industrial storage tanks. The tanks are arranged in a row, receding into the distance. The entire image is covered with a semi-transparent blue filter. The text is centered over the middle of the image.

Connecting a Disconnected Industry

Specialty Pharmacy: Linking the Silos





Integrated Care

Conflicting Trends

Economic



Reining-in the **high cost** of healthcare

Industry consolidation
leveraging volume throughput

Clinical



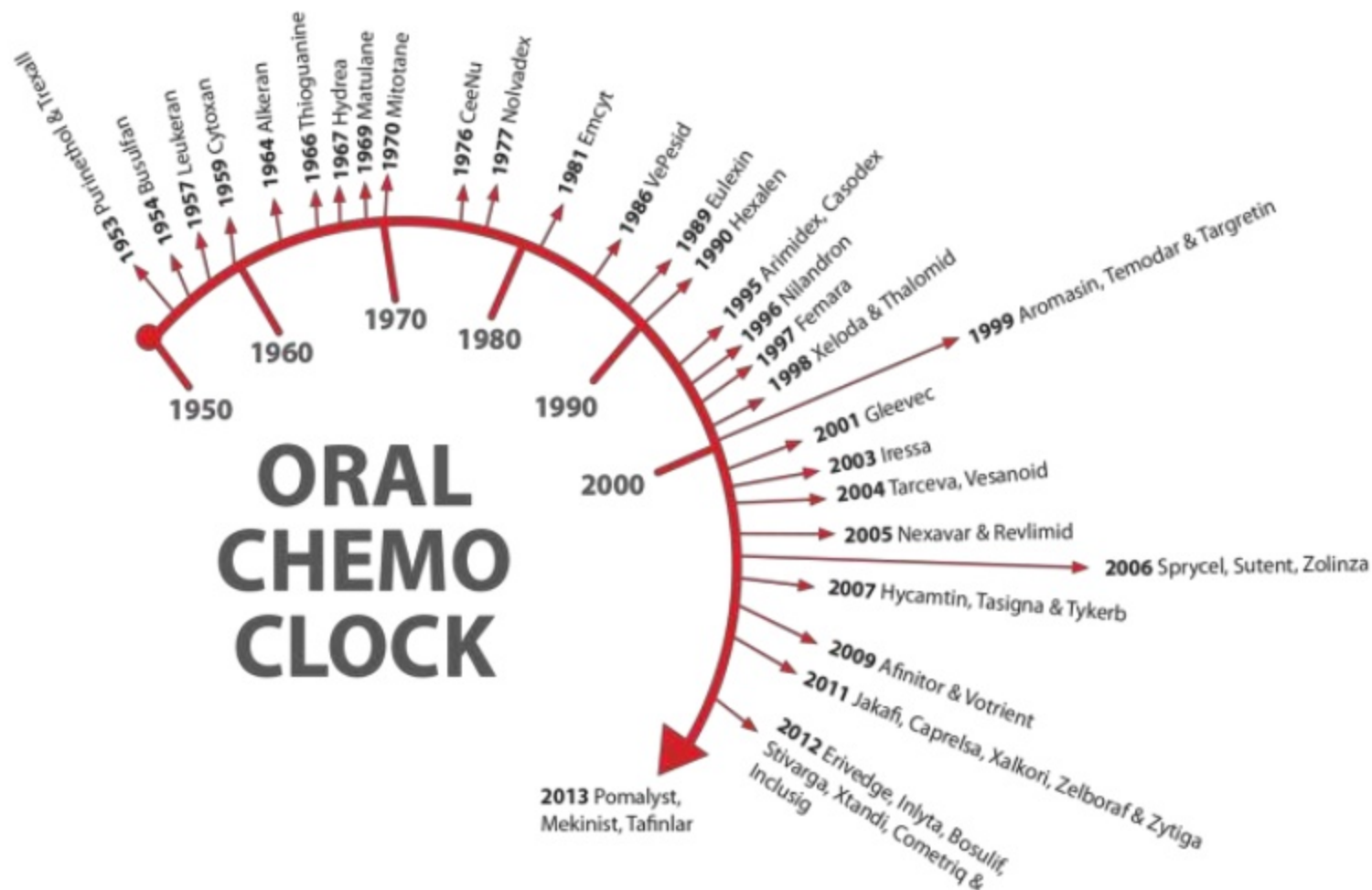
Higher-cost specialty drugs for **smaller** populations of patients

Precision therapy with highly refined patient populations

New Approach Needed:

'Specialty' Specialty Pharmacy to focus on high-cost, low-population needs

Drug Development: Rapidly Advancing Arsenal of Very Costly, High Precision Tools



Ref: Robert Mancini et al. Oral Oncolytics: Part 1—Financial, Adherence, and Management Challenges; August 15, 2013, Cancer Network, Oncology Vol. 27, No. 8

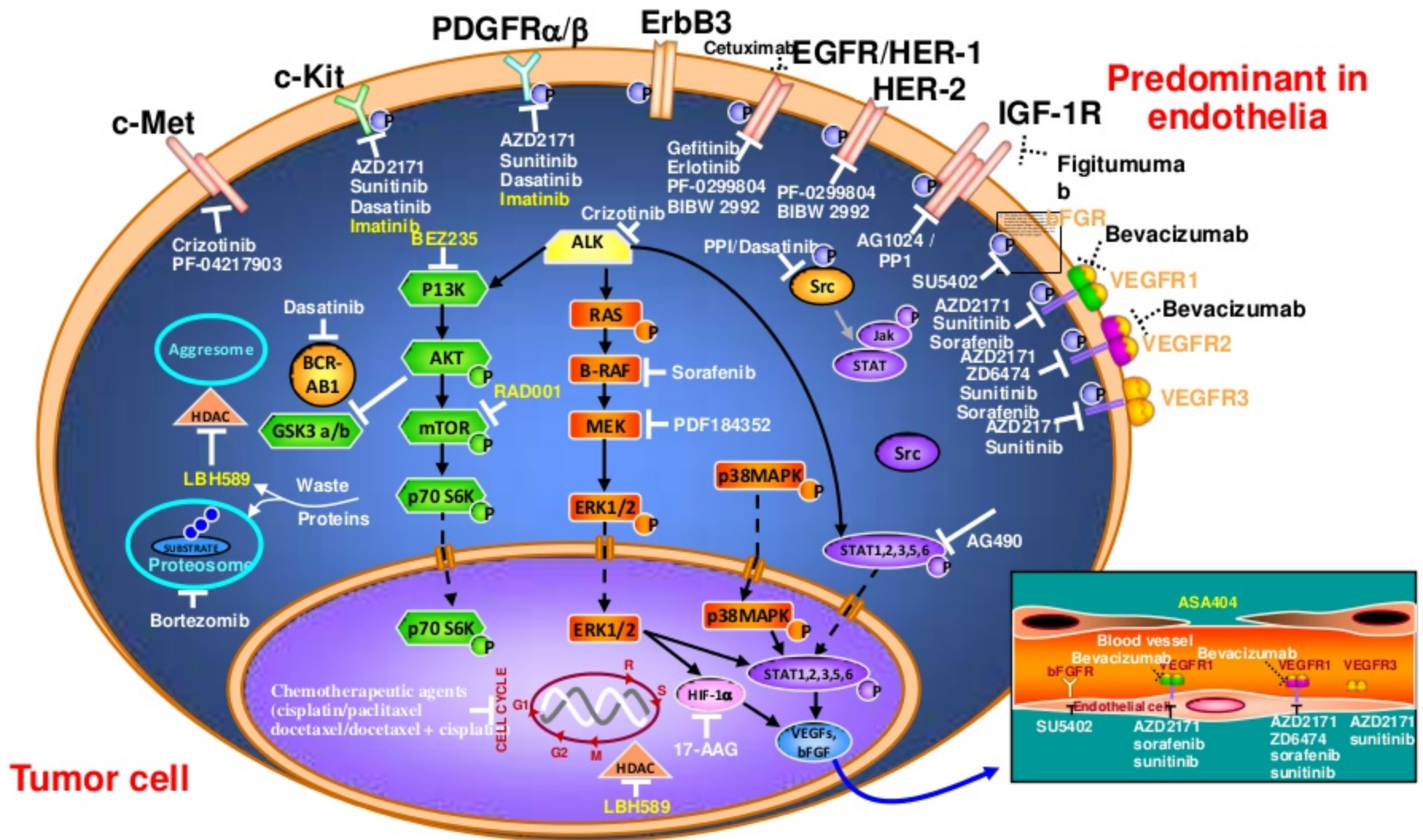
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Launch trajectories (vs Incivek)

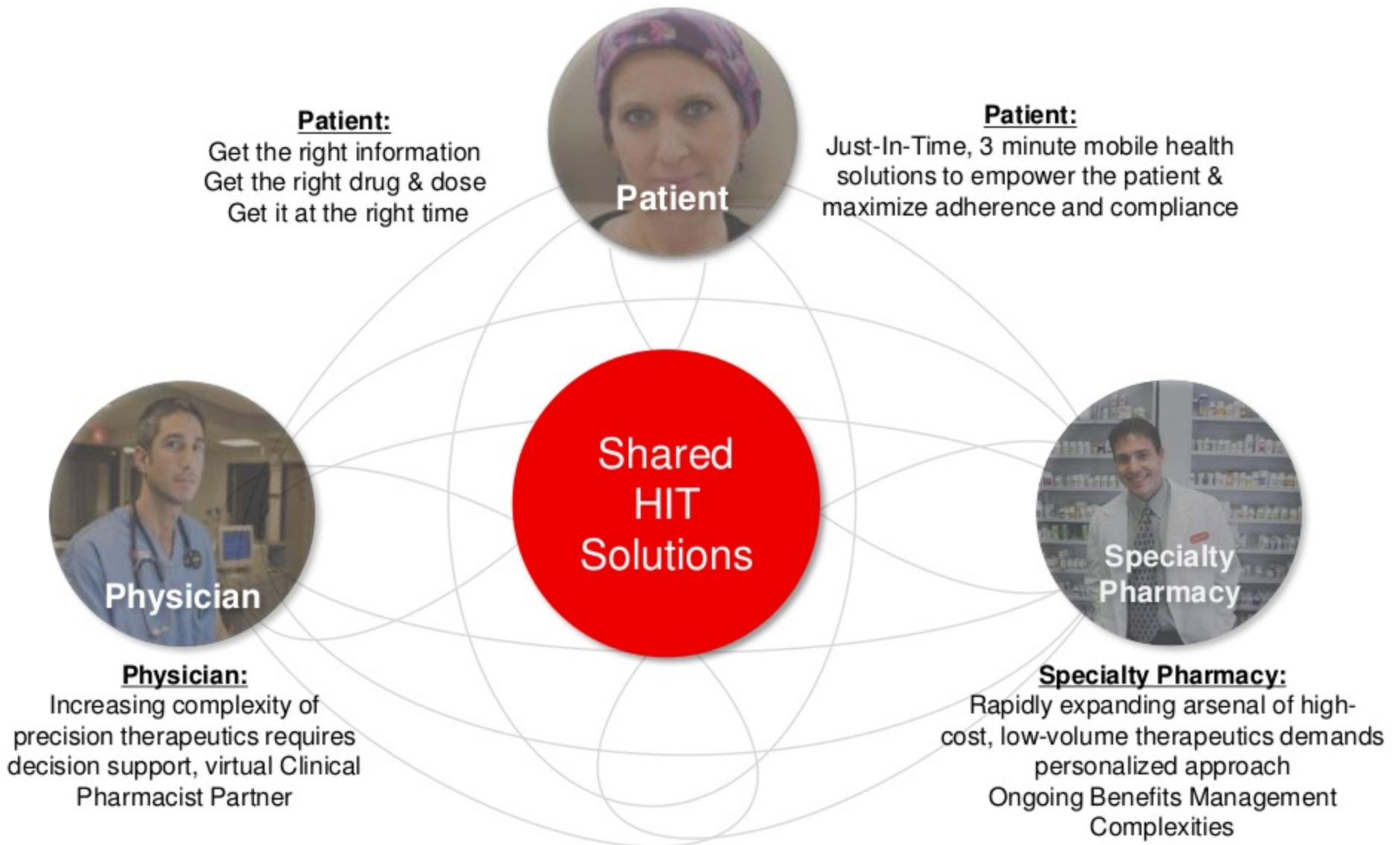


Courtesy Mark Schoenebaum, ISI Group

Drug Specialization: Increasing with Understanding of Biology



Integrated Real-time Close-Looped Solutions Will Drive the Future of Healthcare



Specialty Pharmacy: POS & Medical Benefits, Processing World Collide

