



Healthcare Research & Analytics

## **“No-Call” Restriction at Integrated Delivery Networks on the Rise; Restrictions Threaten Manufacturer Sales Access, but also Impact Educators and Other Non-Sales Roles**

*New research from HRA shows that integrated delivery networks will continue to block pharmaceutical and medical device companies from access to their organizations*

**Plainsboro, NJ (23 April 2014)** – Pharmaceutical, biotechnology, and medical device companies will find it increasingly difficult to gain access to integrated delivery networks (IDNs), according to new research from HRA – Healthcare Research & Analytics. In the company’s most recent study, ***Integrated Health Systems: Unlocking the Potential of the Changing Cardiology Market***, IDNs will continue to implement no-call and restricted-call policies for manufacturer’s sales representatives along with nurse educators and reimbursement specialists.

According to input from 125 cardiology-focused integrated delivery network members, more than 75% of IDNs are placing restrictions, “no-call” or conditional policies, on interactions with pharmaceutical, biotechnology and medical device companies.

Perhaps the most surprising finding regarding access policies is that they appear to be impacting access for non-sales roles as well, including nurse educators and reimbursement specialists. Similar to restrictions on representative interactions, over 70% of IDNs are placing restrictions on interactions with nurse educators and reimbursement specialists. This could signal a complete shut-out from this critical customer segment for manufacturers who don’t act quickly enough to form stronger business-to-business relationships at the IDN’s corporate level.

“...You must think beyond product value,” says Nicole Bradbury, President of Orange Health Solutions and CEO of the Florida Association of ACOs. “[Think about] how that product will meet the strategic need of the IDN, how the product will deliver value to a population.”

HRA’s newest study, ***Integrated Health Systems: Unlocking the Potential of the Changing Cardiology Market***, explores the trends toward integration in the delivery of cardiology care and the future of this changing market. Methodologically, the research pairs extensive desk research with primary qualitative and quantitative research among Pharmacy Directors, Medical Directors, Administrators, Cardiologists, and Hospitalists, from institutions that are part of cardiology-focused IDNs along with those who have cardiology as part of their IDN, however they don’t focus on this therapy area. It also includes perspectives from key opinion leaders (KOLs) who serve as experts in the issues surrounding the healthcare market at large. The research covers a variety of topics including how to define the cardiology-focused IDNs, policies and procedures within these networks, including clinical pathways, treatment protocols, and the relationship of cardiology-focused IDNs with both pharmaceutical and medical device manufacturers. The research provides insights on roles and responsibilities of various



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stakeholders within the cardiology-focused IDN setting and the future outlook for these IDNs, among other themes. HRA's report also provides profiles of the top 25 cardiology-focused IDNs included in the study which provide a blueprint for interacting with these IDNs.

“These integrated delivery networks are increasingly looking to manufacturers to be partners in healthcare,” said Kevin M. Kelly, Executive Vice President & General Manager of HRA. “Pharmaceutical and medical device companies that don't adapt their sales approaches to accommodate this shift will lose their seat at the table.”

To learn more about HRA and read additional insights into the relationship between manufacturers and IDNs provided by *Integrated Health Systems: Unlocking the Potential of the Changing Cardiology Market*, visit [www.hraresearch.com](http://www.hraresearch.com).

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### **About Healthcare Research & Analytics**

HRA – Healthcare Research & Analytics is a consultative healthcare market research practice leveraging a flexible spectrum of solutions to support decision-making and strategy development across healthcare channels with expertise in the hospital channel. HRA's team of highly-experienced market researchers combines deep domain expertise in healthcare, science, business, and statistics with a passion for uncovering insights. HRA's portfolio of offerings encompasses quantitative and qualitative, custom and syndicated market research services to support the business needs of the pharmaceutical, biotech, and medical device markets. HRA's people and its products provide the healthcare market with actionable intelligence – facilitating better business decisions. HRA is a subsidiary of Michael J. Hennessy & Associates, an organization that maintains a unique reach into nearly every sector of healthcare professionals. MJH & Associates combines the power of an established network of publications and websites with the customer service focus and customization capabilities of a boutique firm.

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