

ELEVATE 2025

Conference Workbook



**Built for
Growth**

We're glad you're here

We have informative and engaging sessions ahead that will leave you with actionable strategies to help your plan grow.

As you get to know the people in the room and out and about, you should know that the lanyard on your name badge designates your area of expertise within your plan as outlined on this page.

Sales and marketing

Finance

Pharmacy/Clinical

Growth team

Evernorth Health Services



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Introducing the brand-new **Rx IQ Training Hub**, launching October 1


This Hub brings together everything you need to become a pharmacy selling genius, all in one place.


Explore five key areas:

 Pricing

 Value prop

 Clinical

 Sales prospecting

 Market intelligence

You'll find a variety of easily digestible, market-ready content, including:

- + Shortened PBM training series
- + Videos
- + Custom presentation replays
- + Sell sheets and one-pagers
- + Podcasts
- + White papers
- + Best practice checklists
- + More pharmacy benefits.

Directly linked from the Health Plan Hub, ensuring everyone on your team has access.



Session notes and action items

Building your foundation for growth

Key takeaways

- + Having an intentional plan, timeline and accountability are crucial to meeting your goals.
- + In today's environment, having front line expertise is a necessity for pharmacy success.

Next steps

- + Schedule your Q4 goal setting onsite.
- + Rx IQ Training Hub launches October 1 from the Health Plan Hub.

If you remember nothing else, remember this:

Evolving how you do business is required in this complex selling environment—create SMART Rx growth goals and train your front line.



Additional key takeaways:

Additional next steps:

**Based on what I learned in this session,
what will I start doing differently now?**

Additional notes:

Pharma pulse: Trends shaping tomorrow

Key takeaways

- + The unpredictable drug pricing market highlights the need for proactive formulary planning and cost control.
- + With new drugs focusing on specialty medications and biosimilars, and rebates often under legislative scrutiny, it's crucial to have a consistent strategy. This helps protect against potential risks and capture value in RFPs, whether you're renewing with current clients or attracting new ones.
- + The federal government is pushing for Most Favored Nation (MFN) pricing, requiring pharma contracts to ensure lower costs for Medicare, Medicaid and commercial markets. These proposals could change global drug pricing and local plan negotiations.

Next steps

- + It's crucial to keep your go-to-market strategies flexible when quoting rebate guarantees. This helps you create top-notch offers while safeguarding your financial risk.
- + Review the reservation of rights and rebate credit language to better handle potential market changes. This enforces your value prop.

If you remember nothing else, remember this:

Drug pricing is entering a new era. Be ready. This isn't a forecast. It's a call to action.



Additional key takeaways:

Additional next steps:

**Based on what I learned in this session,
what will I start doing differently now?**

Additional notes:

Policy and partnerships: Navigating the network landscape

Key takeaways

- + Several legislative efforts across the country could affect how you manage pharmacy benefits and approach the market.
- + Conversations about pricing are changing as the market focuses more on value.
- + Take the initiative to talk with your brokers and clients. Educate them about industry challenges and the value you offer.

Next steps

- + Stay up to date on the changing pharmacy reimbursement landscape, including spread prohibition and divestiture laws in various states.
- + Review your network alignment and pricing strategies to align with emerging models.
- + Reassess your profitability under new reimbursement structures such as NADAC + X% and guaranteed profitability bills.

If you remember nothing else, remember this:

The pharmacy industry is at a turning point. It's being changed by fast innovation, new regulations and legislative pushes. Stakeholders need to act quickly and adapt to these changes.



Additional key takeaways:

Additional next steps:

**Based on what I learned in this session,
what will I start doing differently now?**

Additional notes:

Elevate your game: Prospect smarter, retain better

Key takeaways

- + Prospecting and retention are more connected than you might think. Use the same overall process, but tailor it to the specific type of opportunity.
- + The key to solving Rx challenges and winning or retaining business is to listen to your clients and prospects and understand their needs deeply.
- + Early and consistent engagement with consultants is crucial, since their support and insights significantly influence client perceptions and final decisions.

Next steps

- + Evaluate your overall Rx sales process to ensure that you place proper emphasis on the right steps.
- + Engage your growth team to implement the strategies and best practices discussed in this session. That's why we're here.

If you remember nothing else, remember this:

Success starts long before the RFP stage. Skipping early engagement steps results in reactive and less effective positioning, which can limit your ability to win and retain business.



Additional key takeaways:

Additional next steps:

**Based on what I learned in this session,
what will I start doing differently now?**

Additional notes:

Deal dissected: A consultant's perspective

Key takeaways

- + Understanding the client's pain points will help you submit a successful bid that really showcases your unique value.
- + Clear and thorough communication with the consultant about terms and conditions is crucial for a fair evaluation.
- + To get full credit for the value your plan offers, you need to know how the deal is being evaluated.

Next steps

- + Be sure to assess and update how you and your plan interact with your top consultants and brokers. Understanding their evaluation process is key.
- + Use the consultant Q&A panel later today to ask any new questions that come up from the insights you've gained in this session.

If you remember nothing else, remember this:

Understanding how the consultant evaluates your offer is crucial to ensure you get the credit you deserve. This can only be achieved through thorough discussions with the consultant before, during and after each bid.



Additional key takeaways:

Additional next steps:

**Based on what I learned in this session,
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Additional notes:

Redefining retention: ICHRA and Medicare age-in strategies

Key takeaways

- + Keeping members in the market is crucial for overall plan growth.
- + Members aging out of commercial plans present an opportunity to retain them in Medicare products.
- + Currently, 39% of Medicare-eligible members choose to leave annually, highlighting the need for better retention strategies.
- + Accredo® Specialty Pharmacy continues to actively manage specialty costs through benefit designs and manufacturer engagement that address increasing federal and regulatory restrictions.

Next steps

- + Evaluate your strategies for retaining members for life and set comprehensive retention goals.
- + Work with your regulated market growth consultants to learn more and keep more commercial members despite market challenges.

If you remember nothing else, remember this:

The risk of losing commercial members has increased due to ICHRA and competitors capturing your age-in members. However, you can manage this risk effectively.



Additional key takeaways:

Additional next steps:

**Based on what I learned in this session,
what will I start doing differently now?**

Additional notes:

Winning the rebate game: How to optimize and articulate your value

Key takeaways

- + Total rebate dollars depend on utilization and formulary coverage decisions, which tend to remain stable despite exclusions, terms and conditions.
- + Mitigating risk is key to securing future rebates. Reducing claims through market-based terms such as exclusions, channel classifications, reconciliation language and reservation of rights is essential for an optimal bid strategy.
- + Understanding the differences between your wholesale contract and downstream strategy is crucial for setting guarantees and developing a strong go-to-market approach.

Next steps

- + Review the terms and conditions in both your wholesale contract and downstream ASO offerings to maximize guarantee value.
- + Use market-level exclusions and optics to stay competitive in your market.
- + Collaborate with your growth team to develop a consistent go-to-market strategy, ensuring a competitive rebate offering.

If you remember nothing else, remember this:

The total value of your rebates isn't affected by exclusions or optics, but their perceived value is. Regularly review your go-to-market strategy and get valuable feedback from consultants to keep your offerings effective.



Additional key takeaways:

Additional next steps:

**Based on what I learned in this session,
what will I start doing differently now?**

Additional notes:

Advancing the Rx pricing dialogue in an evolving market

Key takeaways

- + Both regulatory and market forces are changing how the industry thinks about PBM economics.
- + Financial discussions are shifting away from traditional structure to focus more on transparency and total cost.
- + New pricing models are entering the market, tied to either different benchmarks or total cost of care.

Next steps

- + Understand the advantages and risks of your current ASO pricing strategy.
- + Proactively engage with your top brokers and consultants to understand their perspective.
- + Be prepared to utilize multiple pricing models.

If you remember nothing else, remember this:

Transparency and predictability are more important than ever when it comes to pharmacy pricing. Prioritizing affordability and simplicity can set your plan apart in a rapidly evolving environment.



Additional key takeaways:

Additional next steps:

**Based on what I learned in this session,
what will I start doing differently now?**

Additional notes:

From message to momentum: Value prop activation and finalist meeting excellence

Key takeaways

- + To keep your message consistent yet tailored, have a core set of differentiators with a library of examples and proof points.
- + Look at your message from an outside perspective: What are your competitors doing? What challenges do your clients face? How are consultants responding?
- + Misaligned planning and preparation can cost you the deal.
- + To win, make the buyer feel understood, not overwhelmed. Focus on their goals, challenges and market to build trust and deliver real impact.

Next steps

- + Connect with your growth team to learn how to use our CI and third-party research capabilities.
- + Have your marketing teams watch the session replay on the Health Plan Hub.

If you remember nothing else, remember this:

If prepared and executed well, the finalist meeting is a golden chance to bring your value proposition to life and deliver a message that truly resonates with your audience.



Additional key takeaways:

Additional next steps:

**Based on what I learned in this session,
what will I start doing differently now?**

Additional notes:



PBM best practices and gap analysis

PBM best practices and gap analysis

Pricing

Does your health plan make pharmacy carve-out difficult?

- + Does your organization prohibit pharmacy carve-out for self-funded business below 500–1,000 lives and all fully insured business?
- + For groups that carve out, does your organization charge a fee of at least \$5.00 PMPM?
- + Does your organization provide a pharmacy carve-in credit for groups that stay carved in?
- + To the extent that you allow plans to carve out a portion of pharmacy (UM, specialty, drug conversion program), do you adjust the pricing accordingly for remaining services?

Does your organization guarantee pricing to all clients that meet the above size threshold?

- + Does your organization provide client-specific guarantees for discounts, dispensing fees and rebates?
- + Are pricing guarantees set for a three-year period with year-over-year improvements?
- + Does your organization allow auditing of your pricing guarantees and proactively tout that right in RFPs and proposals?

Does your organization capture and store prevailing market rates and tactics?

- + Does your organization consistently solicit feedback from consultants on every deal?
- + Does your organization consistently solicit feedback from current/former clients and your PBM partner as well as FOIA requests on public sector bids?
- + Does your organization store this information (both rates and tactics) in a central location that can be accessed for analysis and strategy development?

Pricing (continued)

Does your health plan deploy prevailing market rates and tactics in your bids?

- + Does your organization price every group to market-competitive rates, earning more margin on smaller cases and less margin on larger and more strategic cases?
- + Does your organization have a standard pharmacy benefit contract that incorporates the prevailing terms and conditions (including exclusions such as biosimilars and 340B) that you use for the majority of your groups and consultants?
- + For top consultants and opportunities, does your organization negotiate and agree to “custom” terms and conditions outside of the RFP setting that can be used with those consultants for all mutual cases?

Does your organization structure ancillary funds and fees consistent with those of your competitors?

- + Does your organization offer implementation funds for new clients and pharmacy management funds for existing clients?
- + Does your organization agree to pay all consulting fees when asked, underwriting those expenses into your financial offer?
- + Does your organization charge separate fees for ancillary services, allowing for deeper headline rates?

Does your organization consistently and proactively articulate the financial value you provide?

- + Does your organization deploy a standard pharmacy-specific pricing proposal document and a robust pharmacy-specific contract?
- + Does your organization proactively provide financial reporting and reconciliation reporting to your clients?
- + Does your organization proactively provide specific drug-spend reporting in addition to total health-care-spend reporting to your clients and consultants on a regular (at least annual) basis?

Solutions

Does your organization have a comprehensive strategy regarding your channel solutions?

- + Does your organization regularly review (at least annually) all available solutions? (That review must include feedback from your sales teams, consultants and clients as to what they are seeing in the market.)
- + For identified solutions not in your portfolio today, does your organization consistently secure a solution to compete or develop a robust sell-against strategy?
- + Are your sales and account management teams knowledgeable enough to tell your solution story?
- + For solutions offered today, do you have robust metrics, reporting and guarantees to articulate your value?
- + Does your organization offer a cash-pay solution?

Does your organization have a comprehensive strategy regarding your specialty solutions?

- + Does your organization regularly review (at least annually) all available solutions? (That review must include feedback from your sales teams, consultants and clients as to what they are seeing in the market.)
- + For identified solutions not in your portfolio today, does your organization consistently secure a solution to compete or develop a robust sell-against strategy?
- + Are your sales and account management teams knowledgeable enough to tell your solution story?
- + For solutions offered today, do you have robust metrics, reporting and guarantees to articulate your value?
- + Does your organization have a robust strategy to address alternative funding, copay assistance and copay maximizer solutions?

Does your organization have a comprehensive strategy regarding your pharmacy drug solutions?

- + Does your organization regularly review (at least annually) all available solutions? (That review must include feedback from your sales teams, consultants and clients as to what they are seeing in the market.)
- + For identified solutions not in your portfolio today, does your organization consistently secure a solution to compete or develop a robust sell-against strategy?
- + Are your sales and account management teams knowledgeable enough to tell your solution story?
- + For solutions offered today, do you have robust metrics, reporting and guarantees to articulate your value?
- + Does your organization offer a rebate-driven exclusionary formulary and utilization management offering?

Solutions (continued)

Does your organization have a comprehensive strategy regarding your care solutions?

- + Does your organization regularly review (at least annually) all available solutions? (That review must include feedback from your sales teams, consultants and clients as to what they are seeing in the market.)
- + For identified solutions not in your portfolio today, does your organization consistently secure a solution to compete or develop a robust sell-against strategy?
- + Are your sales and account management teams knowledgeable enough to tell your solution story?
- + For solutions offered today, do you have robust metrics, reporting and guarantees to articulate your value?
- + Does your organization provide a patient safety and protection program that leverages both your medical and pharmacy data to drive better patient adherence and improve health outcomes?

Does your organization have a comprehensive strategy regarding your engagement solutions?

- + Does your organization regularly review (at least annually) all available solutions? (That review must include feedback from your sales teams, consultants and clients as to what they are seeing in the market.)
- + For identified solutions not in your portfolio today, does your organization consistently secure a solution to compete or develop a robust sell-against strategy?
- + Are your sales and account management teams knowledgeable enough to tell your solution story?
- + For solutions offered today, do you have robust metrics, reporting and guarantees to articulate your value?
- + Does your organization offer a web-based tool that lets members compare drug prices to find the lowest-cost drug and pharmacy?

Value prop

Does your organization have a differentiated value story in the market?

- + Does your organization have a strong value proposition centered on the value of an integrated medical and pharmacy offering?
- + Does your organization's story include why your plan is different from and better than your competition's?
- + Does your organization regularly compare its story with competitors'/consultants' to confirm it's unique?

Does your organization support your value proposition with proof points?

- + Does your value proposition include data points that quantify the value of an integrated offer with your plan?
- + Does your value proposition include multiple and varied case studies or other proof points?
- + Does your organization provide reporting and/or guarantees for your differentiators, including the value of integration?

Does your go-to-market team have the expertise needed to tell your story?

- + Are your sales and account management teams able to flawlessly deliver your VOI and overall value story?
- + Is your health plan considered a pharmacy expert in your market?
- + Does your organization have ongoing education/training to ensure go-to-market teams are up to date on your value story and pharmacy expertise?

Sales/Prospecting

Does your organization proactively maintain a list of top pharmacy prospects and future renewals?

- + Does your organization maintain a list of existing medical-only clients that includes contract length, incumbent, relevant relationships and pain points?
- + Does your organization have a prospecting strategy spanning 18–24 months that is deployed in all cases and personalized for top cases?
- + Does your organization actively track and review win/loss results on a consistent basis?

Does your organization have a robust and targeted consultant engagement strategy?

- + Are your sales teams asking for and receiving constructive feedback throughout the entire bid process (after each round and after the final decision)?
- + Does your organization meet with consultants regularly throughout the selling cycle independent of specific bid discussions?
- + Does your organization offer pharmacy-benefit-specific broker compensation?

Does your organization have a robust competitive intelligence gathering process?

- + Does your organization collect and share competitive intelligence across the organization and use it to create strategy?
- + Does your organization store intelligence in a central accessible location that is regularly maintained/updated?

Does your organization have a defined proposal/RFP/finalist process?

- + Does your organization maintain a library of pharmacy-specific RFP responses? The library should be reviewed/refreshed at least annually and include client case studies and references.
- + Does your organization have a defined process for when a pharmacy RFP is received, including a kick-off call?
- + Does your organization attain at least 90% compliance with RFP requirements?
- + Does your organization maintain a robust pharmacy-specific finalist tool kit?
- + Does your organization plan diligently for each finalist presentation, including multiple in-character dry runs?

Org structure

Is your organization staffed today to support a high-touch model with multiple pharmacy touchpoints?

- + Do your cross-functional go-to-market teams (legal, sales, underwriting and proposals) have a pharmacy benefit subject matter expert?
- + Does your organization require and provide regular (at least annual) pharmacy benefit training to all go-to-market teams?
- + Do your cross-functional go-to-market teams meet regularly (at least monthly) to discuss pharmacy benefit strategy and approach?

Is your account staff incentivized for/measured against pharmacy retention and new sales goals?

- + Does your organization set and regularly measure Rx-specific growth and retention targets at the health plan/market-segment level?
- + Does your organization set Rx-specific growth and retention targets for individual sales reps?
- + Does your organization have a distinct Rx compensation structure that actively incentivizes Rx retention and new Rx carve-in?

Visit the Health Plan Hub

Elevate eventually ends, but the insights continue on the **Health Plan Hub**.

We're committed to driving your growth and providing insights across all lines of business year-round. That's why we provide online access to the ongoing support you need, including:

- + All Elevate 2025 post-event content
- + Past Elevate recorded sessions
- + Additional monthly featured content
- + Insights into Regulated Markets
- + Exclusive Regulated Markets content
- + The latest news and insights from Evernorth Health Services



Brand new
Rx IQ Training Hub
launching October 1



Coming soon

The Hub is undergoing some exciting updates to enhance your experience and help you find exactly what you need.



Get on the list to be notified when new content has been posted.

Reach out to your growth team, sign up at the Marketing Elevated Engagement station, or email hprmresources@express-scripts.com.

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