

PBM Relationship Segmentation Tool: Mapping Your Organization's PBM Relationship

Introduction and Instructions

The National Pharmaceutical Council (NPC) research report [Toward Better Value](#) noted a potential relationship between employers' engagement in managing prescription drug benefits and their overall trust in/satisfaction with their pharmacy benefit manager (PBM). Derived from the research, this worksheet enables employers to:

- A. gauge their approximate position on a segmentation grid measuring employers' active engagement in pharmacy benefit management and their trust/satisfaction with PBMs, and
- B. use that segmentation position to guide potential action steps to move up and/or right on the segmentation grid below – toward greater engagement and trust/satisfaction.

Steps for completing the worksheet are:

1. In the two tables below, review each item and choose the response that most accurately reflects your organization's behavior over the past year (versus what you plan/aspire to do). Tally the points associated with each set of items (trust/satisfaction and engagement).
2. Plot the points your organization scored on the 2-by-2 segmentation grid provided.
3. Identify actions to increase your organization's engagement and/or trust/satisfaction.

Step 1: Rate and Tally Trust/Satisfaction and Engagement Questions

Trust/Satisfaction with Pharmacy Benefit Management Vendor

Items	Scoring
1. How well-aligned are the goals of your PBM with your organization's employee health, productivity and cost goals?	<input type="checkbox"/> Not at all aligned (0 points) <input type="checkbox"/> Moderately aligned (1 point) <input type="checkbox"/> Highly aligned (2 points)
2. How trustworthy is your PBM in providing services that are in the best interest of your organization and its employees?	<input type="checkbox"/> Not at all trustworthy (0 points) <input type="checkbox"/> Moderately trustworthy (1 point) <input type="checkbox"/> Very trustworthy (2 points)
3. How well does your PBM perform at negotiating with manufacturers to achieve cost savings?	<input type="checkbox"/> Poor (0 points) <input type="checkbox"/> Fair (1 point) <input type="checkbox"/> Excellent (2 points)
4. How well does your PBM perform at implementing tactics to help control costs by ensuring use of the most cost-effective treatments?	<input type="checkbox"/> Poor (0 points) <input type="checkbox"/> Fair (1 point) <input type="checkbox"/> Excellent (2 points)
5. How well does your PBM perform at implementing tactics to help improve health by ensuring patients are prescribed the most effective treatments?	<input type="checkbox"/> Poor (0 points) <input type="checkbox"/> Fair (1 point) <input type="checkbox"/> Excellent (2 points)
Total Points (plot on vertical axis in Step 2)	

Engagement in Pharmacy Benefit Management

Items	Scoring
1. In the past five years, has your organization completed a comprehensive evaluation of moving to a fully transparent, pass-through PBM model?	<input type="checkbox"/> No (0 points) <input type="checkbox"/> Yes (1 point) <input type="checkbox"/> We use a fully transparent pass-through PBM (2 points)
2. Which of the following best describes your organization's typical approach to a prescription drug list or formulary (PDL)?	<input type="checkbox"/> Accept PDL with no changes or customization (0 points) <input type="checkbox"/> Add or remove ≤ 5 drugs to better suit the needs of our employees (1 point) <input type="checkbox"/> Add or remove 5+ drugs to better suit the needs of our employees (2 points)
3. Do you or does someone on your team understand the details of the contract your organization has with its PBM?	<input type="checkbox"/> No (0 points) <input type="checkbox"/> Somewhat (1 point) <input type="checkbox"/> Yes, fully (2 points)
4. Do you or does someone on your team understand your PBM's performance guarantees?	<input type="checkbox"/> No (0 points) <input type="checkbox"/> Somewhat (1 point) <input type="checkbox"/> Yes, fully (2 points)
5. Have you or has someone on your team invested significant time reading and understanding the contract your organization has with its PBM?	<input type="checkbox"/> No (0 points) <input type="checkbox"/> Somewhat (1 point) <input type="checkbox"/> Yes, fully (2 points)
Total Points (plot on horizontal axis in Step 2)	

Step 2: Plot Your Scores

To identify your organization's position relative to PBM trust/satisfaction versus engagement in managing your pharmacy benefit, identify the spot at which the point totals from the above tables intersect.

Note the quadrant in which your plot falls.



