

CLIENT LANDSCAPE ANALYSIS

McKara Street | **Marketing**

Atorvastatin Calcium
Oral Tablet
40 MG

qty: 90

Atorvastatin Calcium
Oral Tablet
80 MG

qty: 30

Atorvastatin Calcium
Oral Tablet

qty: 90

Azelastine HCl Nasal
Solution 0.1 %

qty: 30

Azithromycin Oral
Tablet
250 MG

qty: 6

OVERVIEW

- I. Key Goals and Deliverables
- II. Client Segments
- III. Pain Points
- IV. Decision Drivers
- V. Market Sizing
- VI. Strategy
- VII. Next Steps
- VIII. Closing
- IX. Resources



KEY GOALS & DELIVERABLES

KEY GOALS

- Understand the **client landscape** of A-S Medication Solutions
- Define and prioritize **target segments**
- Understand **client needs** and **market dynamics**
- Quantify **market opportunity**
- Develop **actionable strategies** and **recommendations**

DELIVERABLES

- Summary report document
- Summary report slide deck
- Actionable strategies and recommendations to prioritize key client segments and needs

MOST RESPONSIVE SEGMENTS

Segment	Needs
Employer Health Clinics	<ul style="list-style-type: none">• Improve adherence and health outcomes• Reduce overall healthcare costs• Demonstrate ROI and cost-effectiveness
Urgent Care Centers	<ul style="list-style-type: none">• Fast and efficient dispensing• Simplified workflows• Reliable inventory & compliance support
Direct Primary Care	<ul style="list-style-type: none">• Affordable, transparent medication pricing• Seamless dispensing workflows• Integration with existing systems
Orthopedic Clinics	<ul style="list-style-type: none">• Tailored formulary• Convenient access to medications• Compliance with bundled payment and surgical safety standards• Support for Workers' Comp dispensing and billing
Student Health Centers	<ul style="list-style-type: none">• Affordable and accessible medication options• Mail-order flexibility and reliability• Integration with campus health systems

OTHER CLIENT SEGMENTS

Segment	Need
Specialty Clinics	<ul style="list-style-type: none">• Tailored medication solutions for complex/chronic conditions
Community Health Care	<ul style="list-style-type: none">• Affordable access to medication for underserved populations
Telehealth Providers	<ul style="list-style-type: none">• Remote dispensing and seamless digital integration
Behavioral Health Clinics	<ul style="list-style-type: none">• Medication support for mental health treatment
Primary Care Centers	<ul style="list-style-type: none">• Broad, cost-effective medication access for general health needs
Retail Clinics	<ul style="list-style-type: none">• Fast and convenient dispensing for walk-in patients

PAIN POINTS

POTENTIAL CLIENTS

1. Cost
2. Timing
3. Workflow
4. Willingness
5. Contract Length

CURRENT CLIENTS

- Repackaging
- Backorder notifications, ETA, too much backorder
- Auto-refills
- Updates & training for new hires/training refreshers

DECISION DRIVERS



Easy Workflow



Cost



Adherence



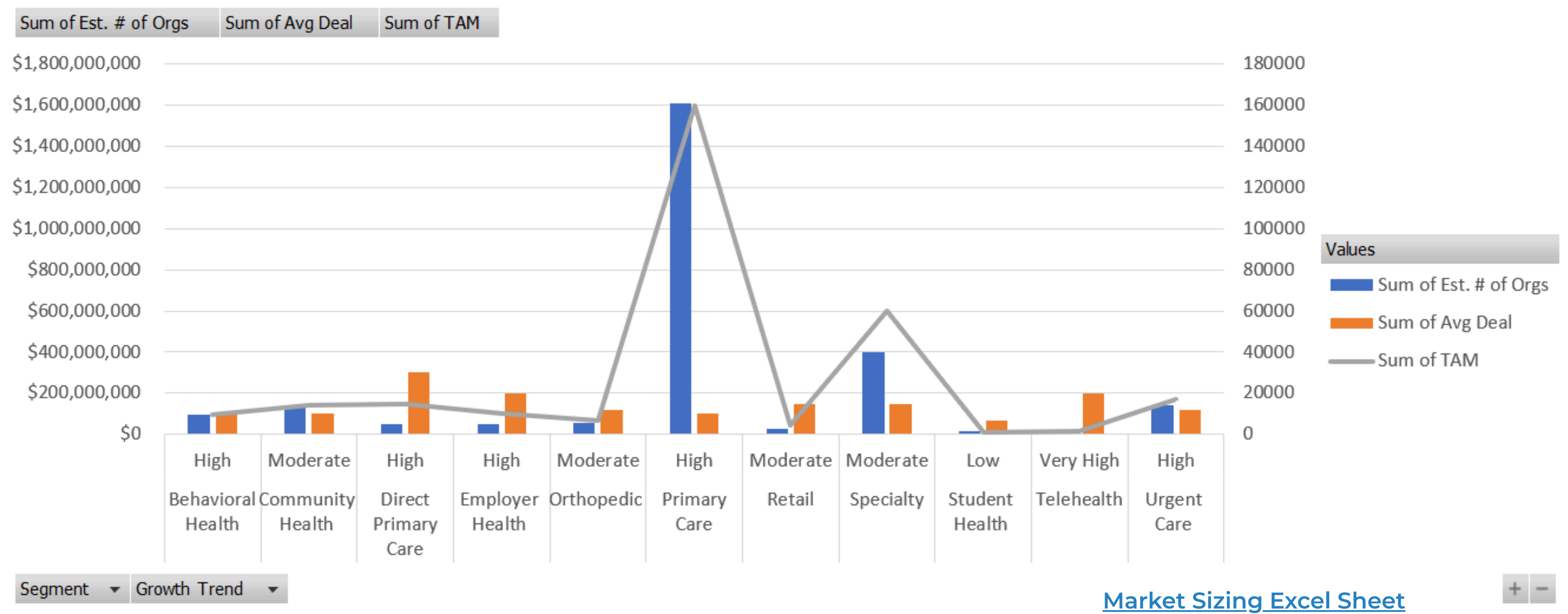
Trust



Potential Profit



MARKET SIZING OVERVIEW



MARKET SIZING

LARGEST OPPORTUNITY

- **Primary Care** by far
- **Specialty** and **Urgent Care** follow

UNDERSERVED OPPORTUNITIES

Niche Target & Innovation

- **Telehealth** has a relatively low TAM but very high growth

Premium Market

- **DPC** has a smaller org base but a relatively high average deal size

MARKET SIZING

HIGH GROWTH SEGMENTS

- Telehealth (very high)
- Primary Care
- Urgent Care
- Employer Health
- DPC
- Behavioral Health

COMPETITIVE INTENSITY

- **Urgent Care** and **Telehealth** have very high competitive intensity
- **Primary Care** & **Specialty** also have high competition

STRATEGY OVERVIEW

OBJECTIVES

Value Based Messaging

Pain Point Alleviation

Trust Building

MESSAGING THEMES

“Simplified dispensing, maximized value.”

“Flexible, profitable, and patient-centered.”

“Your pharmacy partner in patient outcomes.”

Value Based Messaging

ADDRESS:

Cost Savings

Workflow Simplicity

Profitability

WHY?

Found that clients care most about cost, the simplicity of workflow, and profitability when it comes to making a decision

Pain Point Alleviation

ADDRESS:

Timing Transparency

Contract Flexibility

Communication Issues

WHY?

Found that potential clients most often ask questions about the timing of the implementation process and contract length

Trust Building

ADDRESS:

Adherence Support

Training Refreshers

Transparency

WHY?

Found that clients value adherence support, and most often complain about training for new staff and lack of transparency in backorders and their ETA

STRATEGY PER SEGMENT

Segment	Targeting Strategy	Messaging
Employer Health Clinics	<ul style="list-style-type: none">• Cost• Formulary control• Adherence• ROI• Employee health outcomes	“Lower your healthcare spend while improving employee wellness.”
Urgent Care Centers	<ul style="list-style-type: none">• Speed• Workflow integration• Onsite dispensing	“Fast, seamless dispensing that keeps your urgent care truly urgent.”
Direct Primary Care	<ul style="list-style-type: none">• Autonomy• Cost control• Simplified pharmacy solutions	“Empower your practice with direct, affordable pharmacy access.”

STRATEGY PER SEGMENT

Segment	Targeting Strategy	Messaging
Orthopedic Clinics	<ul style="list-style-type: none">• Pain management• Formulary customization• Adherence	“Support recovery with tailored dispensing and streamlined workflows.”
Student Health Centers	<ul style="list-style-type: none">• Adherence• Cost/affordability• Mail order flexibility	“Affordable, accessible pharmacy care for healthier campuses.”

NEXT STEPS

1. Make Improvements

- a. Workflow
- b. Cost transparency
- c. Training & support
- d. Tailored outreach

2. Inform the Sales Team

- a. Present strategy & improvements

3. Implement Strategies

- a. Value based messaging
- b. Pain point alleviation
- c. Trust building



CLOSING

Focus Going Forward:

- Address pain points and key decision drivers by making improvements in our processes
- Tailor marketing and sales efforts to each segment
- Overall, we must **present value, alleviate pain points**, and **build trust** with our current and potential clients to improve our sales and marketing effectiveness

Questions?

RESOURCES

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IMPROVEMENTS



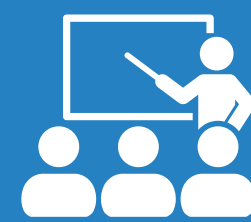
WORKFLOW

- Simplify the workflow
- Demo workflow/video to show workflow in real time
- Testimonials of how easy the workflow is
- Give numbers for the speeds



COST TRANSPARENCY

- Develop cost calculator
 - Use in sales process & website
- Give real ROI numbers



TRAINING AND SUPPORT

- Streamline the onboarding process (in progress)
- Offer refresher training
- Offer training for new staff
 - Videos or implement time for onboarding staff to perform training



TAILORED OUTREACH

- Produce ads, social media posts, sales materials, & presentations
- Custom ads per segment
 - Google ads
 - Social media ads

UNDERSERVED MARKETS

- Men's Health
- HRT
- Correctional Health & Juvenile Detention Facilities
- Nursing Homes
- Community Mental Health Centers

BUYING PERSONAS

PATTY



Practice Manager

Manages daily operations, scheduling, staffing

Goals

- Refine the workflow
- Maximize revenue
- Improve patient adherence

Pain Points

- Patient satisfaction
- Cumbersome workflow

Decision Making Process

- Evaluates based on usability and ROI

CARL



Medical Director

Oversees clinical quality, protocols, and provider performance

Goals

- Improve care outcomes
- Improve data visibility
- Adopt clinically sound tools

Pain Points

- Provider resistance to change
- Lack of actionable data

Decision Making Process

- Skeptical of sales-heavy messaging

TONY



IT Director

Manages infrastructure, integrations, cybersecurity, and vendor onboarding

Goals

- Ensure uptime
- Minimize risk
- Simplify tech stack

Pain Points

- Integration issues
- Compliance complexity

Decision Making Process

- Technical specs & security protocols

BUYING PERSONAS

FAITH



Finance Director

Oversees purchasing, vendor contracts, and budget approvals

Goals

- Reduce costs
- Ensure vendor accountability
- Maximize value

Pain Points

- Long sales cycles
- Hidden costs

Decision Making Process

- Data-driven
- RFO platforms

WENDY



HR Manager

Manages employee health programs & vendor partnerships

Goals

- Improve employee health
- Reduce absenteeism
- Demonstrate ROI

Pain Points

- Low engagement
- Unclear outcomes

Decision-Making Process

- Seeks proven engagement strategies and outcome data

CLIENT NEEDS

IN RELATION TO OUR SERVICES

Service	Need	Expectation
On-Site Dispensing	Improved medication management; better patient adherence	<ul style="list-style-type: none">• Shorten wait times• Improve patient relationship• Make patient lives easier
Mail Order	Convenience for patients	<ul style="list-style-type: none">• Improve patient adherence• Improve patient convenience
Claim Adjudication	Improved compliance; claims management	<ul style="list-style-type: none">• Manage claims• Adjudication

CLIENT NEEDS

IN RELATION TO OUR SERVICES

Service	Need	Expectation
Retail Card Program	Improved compliance; claims management	<ul style="list-style-type: none">• Set pricing for medications
Rebate Program	Increase revenue	<ul style="list-style-type: none">• Make rebates on meds
Full-Service Pharmacy Solution	Rx medications	<ul style="list-style-type: none">• Rx medications

REGULATORY & REIMBURSEMENT INFLUENCES

Segment	Regulatory Influences	Remibursement Models
Orthopedic Clinics	<ul style="list-style-type: none">• CMS bundled payments for joint replacements• Surgical safety standards• HIPAA	<ul style="list-style-type: none">• Fee-for-service• Bundled payments
Primary Care	<ul style="list-style-type: none">• Value-based care initiatives• Telehealth parity laws• HIPAA	<ul style="list-style-type: none">• Capitation• Fee-for-service• Value-based care
Student Health Centers	<ul style="list-style-type: none">• FERPA• HIPAA• State immunization laws• Campus-specific policies	<ul style="list-style-type: none">• Institutional funding• Student health fees• Limited insurance billing

REGULATORY & REIMBURSEMENT INFLUENCES

Segment	Regulatory Influences	Remibursement Models
Employer Health Clinics	<ul style="list-style-type: none">• OSHA• HIPAA• ERISA• Wellness program regulations	<ul style="list-style-type: none">• Employer-funded• Direct contracting• Capitation
Urgent Care Centers	<ul style="list-style-type: none">• State licensure• EMTALA• HIPAA	<ul style="list-style-type: none">• Fee-for-service• Value-based care



MARKET SIZING

STRATEGIC IMPLICATIONS

- Prioritize **Primary Care** and **Specialty** for broad market coverage
- Explore **Telehealth** and **DPC** for innovation and premium offerings
- Monitor **Urgent Care** and **Behavioral Health** for competitive positioning
- Consider **Community Health** and **Employer Health** for stable, moderate growth opportunities