





**Market forces and pandemic-related trends are increasing Biopharma's need to focus on areas where Clinical Nurse Educators (CNEs) can drive impact**

<p><b>MARKET FORCES</b></p> <p>Specialty pharmaceuticals that require a <b>greater focus on patient adherence</b> represent about 80% of all drug launches today.<sup>1</sup></p> <p>HCPs continue to <b>rate peer-to-peer interactions as top</b> education opportunities from Pharma.<sup>3</sup></p> <p>There are ~400 cell &amp; gene therapies in development today <b>pushing Pharma to completely rethink the patient experience.</b><sup>5</sup></p> <p><b>Value-based contracting is becoming more prominent</b> as 50% of experts believe pricing and reimbursement challenges will have the greatest negative impact on the Biopharma sector.<sup>7</sup></p> <p>The global patient monitoring devices market is expected to grow to \$30.7 billion in 2022 with the main driver being the <b>increasing patient demand for homecare services.</b><sup>8</sup></p>	<p><b>PANDEMIC-RELATED TRENDS</b></p> <p><b>66%</b> of physicians expect a <b>negative impact on adherence</b> due to the current environment.<sup>2</sup></p> <p><b>56%</b> of physicians said fewer sales rep visits would help provide the best patient care, thereby <b>increasing the need for Pharma to find new ways to engage with HCPs.</b><sup>4</sup></p> <p>The FDA recently relaxed guidance for certain digital therapeutic devices and this is expected to <b>drive Biopharma to innovate on the traditional models</b> of patient care.<sup>6</sup></p> <p><b>62%</b> <b>decline in promotional detailing</b> during the pandemic is creating a gap in real-time field knowledge.<sup>4</sup></p> <p><b>17-86%</b> <b>decline of in-office administration volumes</b> with variability across therapeutic areas is increasing patient demand for alternative care models.<sup>4</sup></p>	<p><b>THE 5 WAYS CNEs SUPPORT BRANDS ARE BECOMING INCREASINGLY IMPORTANT</b></p> <ul style="list-style-type: none"> <li> <b>Improving patient persistence and compliance on therapy</b></li> <li> <b>Peer-to-peer HCP education and training</b></li> <li> <b>Complex therapy navigation for patients</b></li> <li> <b>HCP and patient insight collection and real-world data capture for value-based contracting</b></li> <li> <b>At-home product administration, diagnostic testing and patient monitoring</b></li> </ul>
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**Why Clinical Nurse Educators are effective in these areas**



**Patients want to hear from nurses**

Americans rated Nurses as the #1 most trusted professional for the 18th year in a row, according to the 2019 Gallup Poll.



**HCPs want to hear from their peers**

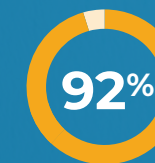
Nurses are rated most effective in delivering HCP office education due to their ability to relate and engage in peer-to-peer clinical discussions.<sup>9</sup>



**97%** of patients said that **VMS nurse support was helpful or very helpful** in addressing questions and alleviating concerns related to COVID-19.<sup>10</sup>



**95%** of patients said that the **information they were getting at this time from VMS nurses was important or very important** relative to information they were getting from Pharma and others.<sup>10</sup>



**92%** of patients, who previously received live training, said that the **virtual support they were receiving from VMS nurses was effective or very effective.**<sup>10</sup>

1. Pharmacy Times. 2. McKinsey. 3. VMS oncology community practice survey, April 2018. 4. IQVIA. 5. Catalyst Pharma. 6. FDA. 7. Pharmaceutical Technology. 8. The Business Research Company. 9. VMS Annual Nurse Survey. 10. VMS COVID-19 Patient Survey.