Healthcare Distribution & Supply Chain September/October 2021

Connecting With Capitol Hill

Washington Summit Amplifies Importance Of U.S. Preparedness And Response

110

SUPPLY CHAIN Thought Leaders Address Resilience

MARKET INTELLIGENCE

COVID's Impact Accelerates ASC Growth

SALES & STRATEGY

Reinventing Distribution's Value After The Pandemic



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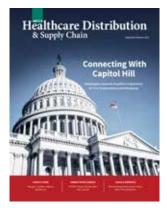
- Gain insights on market trends and opportunities in a post-COVID world
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Registration opens in August 2021. For more information visit HIDA.org/sales-marketing-summit

Healthcare Distribution & Supply Chain[™]

September/October 2021 | Vol. 1 Issue No. 3





Connecting With Capitol Hill

CONTENTS

2 SUPPLY CHAIN

Thought Leaders Address Strengthening The Medical Products Supply Chain

Leveraging Pandemic Lessons To Build Resilience

New Toolkit Paves Way For Greater Pricing Alignment Throughout Healthcare Supply Chain

Managing Through Major Shortages

Best Practices In Allocation Management

MARKET INTELLIGENCE COVID's Impact Accelerates ASC Growth

16 TECHNOLOGY Unlocking The Benefits Of Blockchain

17 SALES & STRATEGY Reinventing Distribution's Value After The Pandemic

18 EVENTS & RESOURCES E-Commerce & Digital Strategies Conference

Sales & Marketing Summit

Vaccine Market Report

Post-Acute Market Report

20 HIDA'S MUST-READ NEWS









Please send magazine inquiries to editor@HIDA.org.



Thought Leaders Address Medical Products Supply Chain Resilience

Strategic policy recommendations outline how the U.S. can improve readiness and response to future pandemics

As the U.S. and the world continue to deal with the ongoing COVID pandemic, leaders from the Health Industry Distributors Association and the HIDA Educational Foundation convened this summer to begin the process of extracting learnings from the COVID pandemic. They discussed answers to a fundamental question: **How can the country improve readiness and response to future pandemics of similar magnitude?**

BACKDROP: PANDEMIC DEMAND OUTPACES SUPPLY 1000+% DEMAND SURGE She Washington Post

A contractor promised FEMA 10 million masks for \$55 million. It did not deliver.



Opportunists
WASTED
TIME AND MONEY

30+ DAY PPE Transportation **DELAYS**



HIDA'S THOUGHT LEADERS RECOMMENDATIONS:

BUILD A BIGGER CUSHION

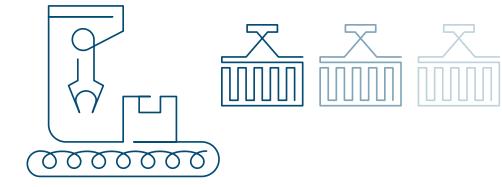
OBJECTIVE:

1

Fulfill providers' initial demand while giving critical time to ramp up manufacturing production capacity

- Absorb the first wave of pandemic demand
- Think beyond conventional stockpiles
- Establish a core critical supply list

A 90-DAY PPE SUPPLY FOR A SINGLE 350-BED HOSPITAL REQUIRES 5700 SQUARE FEET OF STORAGE SPACE



"To have a cushion, manufacturers will need to produce more than they can sell and distributors to store more than their customers need."



2

ESTABLISH A NATIONAL SOURCING STRATEGY

OBJECTIVE:

Establish capacity to quickly ramp up medical supply production

- Increase U.S. manufacturing of critical medical supplies
- Enable U.S. surge manufacturing
- Prioritize transportation for PPE and other pandemic supplies
- Diversify global sourcing

FUTURE STATE:

NO SINGLE FOREIGN COUNTRY SUPPLIES A MAJORITY OF ANY PRODUCT

MIX OF GLOBAL, NEAR-SHORED, AND DOMESTIC SOURCES

Public-Private Supply Chain Partnership

Private Sector Role	Government Role
 Support healthcare providers everyday Sustain, rotate, and replenish stockpiles Advise on and implement core 	 Fully fund the Strategic National Stockpile Fund Distributor Managed Inventories (DMI) in 500 commercial distribution centers nationwide
critical supply listMonitor/communicate inventories	Address needs of states

"Any incentives the government puts in place for domestic manufacturing must be designed for the long term."

ENSURE SUPPLY CHAIN READINESS

OBJECTIVE:

All participants understand roles, expectations, and connection points to access products in an emergency

- Develop structured communications protocols
- Ensure that providers understand how to access products
- Embrace supply chain best practices
- · Partner with proven, experienced companies





"The path to creating a more robust and resilient healthcare supply chain lies in strengthened collaboration between the government and commercial sector. By deepening this partnership, the supply chain will become even more nimble, flexible, and transparent."

 Matthew J. Rowan, HIDA President & CEO



Leveraging Pandemic Lessons To Build Resilience

Medical products distributors reflect on lessons learned during the spread of COVID-19 and offer ways to move forward during HIDA's third Supply **Chain Visibility Conference**



n a wide-ranging discussion reflecting the industry's commitment to continually strengthening the medical supply chain, Concordance Healthcare CEO Lisa Hohman and Owens & Minor SVP of Enterprise Sales Matt Gattuso identified key areas to raise the industry's bar of excellence.





Matt Gattuso **Owens & Minor**



DIVERSIFIED SOURCING

- The pandemic spurred distributors, GPOs, and IDNs to call for more geographic diversification throughout the supply chain.
- COVID-19 has elevated the need to identify where products are sourced, manufactured, and housed.
- The government and commercial sectors agree that the U.S. needs ٠ greater redundancies in manufacturing, including more nearshoring and domestic production.



SURGE MANUFACTURING

- The U.S. must be able to ramp up manufacturing of critical products quickly.
- Strong collaboration between the public and private sectors can help reach this goal.
- Some government grant programs and funding can help ensure availability • of market capacity irrespective of market demand.
- Long-term commitments between business partners for domestically made products will help create stability.



- The commercial sector and federal government collaborated to create a data control tower, providing a model ripe for expansion.
- It provided visible data to government partners that show where critical products.

TECHNOLOGY

- Technologies such as blockchain and artificial intelligence are available to help the medical supply chain become more nimble and customer-centric.
- Greater investments are needed in new technologies to secure company data so organizations can feel confident about sharing critical information.
- Technology needs to track movement throughout the supply chain from raw materials, to manufacturing and distribution, all the way down to healthcare providers and patients.



- Distributors are learning how they can offer solutions for their provider customers who create stockpiles.
- Many providers are responding to state mandates to keep large storage of inventory while others seek to be better prepared for the possibility of a tight supply in the future.
- It can be difficult for some providers to hold and rotate excess inventory to ensure millions of dollars' worth of products don't expire.

"In order to have a resilient supply chain you have to have visibility. Working together as an industry is one of the most important things we can do to ensure we have a better response in the future."

Lisa Hohman,
 Concordance Healthcare CEO



Kyle MacKinnon Premier



Saul Kredi Memorial Healthcare System



DISASTERS HAPPEN. ARE WE READY?

Hurricanes, snowstorms, fires, and other weather events and disruptions happen every year. Kyle MacKinnon with Premier and Saul Kredi with Memorial Healthcare System shared five lessons learned from their experiences during HIDA's Supply Chain Visibility Conference.

- **1.** Build redundancies into the plan. Don't take anything for granted.
- **2.** Don't get complacent. Disaster plans need to be updated.
- **3.** Plan and practice for disaster scenarios.
- 4. When disaster hits, resourcefulness is essential.
- **5.** Establish good communication and visibility internally and with outside vendors so everyone understands their role.



"It will be immensely helpful when we can move to one (format) thanks to this new toolkit."

Jim Burns,
 Regional Sales Manager,
 HD Supply



New Toolkit Paves Way For Greater Pricing Alignment Throughout Healthcare Supply Chain

Distributors, manufacturers and group purchasing organizations collaborate to create standard format for GPOs to receive administrative fees

T o save time and improve pricing accuracy throughout the medical products supply chain, a HIDA workgroup has created a new GPO Administrative Fee Toolkit. It is designed to communicate GPO administrative fees using a standard spreadsheet offering clearly defined fields.

How Non-Standard Reporting Formats Create Inefficiencies

Varying Requirements	Impact
Variation in fields (fields differ, number of fields, naming conventions, field order, format)	Significant formatting and manual cleansing to accommodate differences
Level of granularity (summary vs detail, bill-to/sold-to vs ship-to)	Challenging to validate reporting
Methods to submit (email, FTP, direct upload, EDI)	Inefficient and laborious to process files

The toolkit was developed to address the complex and time-consuming process that suppliers face when reporting admin fees to GPOs, each with different requirements for data fields and formats. During HIDA's Contract Administration Conference, several workgroup members explained the toolkit's development and presented the new template.

"Adopting a standard will create efficiencies for contracted suppliers to create the reports and for GPOs to process them, thereby removing operational costs for these organizations," said Melanie Proctor, Senior Director, Supply Chain Master Data Management, Premier. Proctor is a member of the GPO Administrative Fee Reporting Workgroup and was the lead for the toolkit pilot project.

The new template includes 75 standard data fields and 5 GPO-specific fields to offer flexibility. They are built with automation in mind, in a CSV format with consistent naming conventions for each field. The template is designed to work not only for distributors and manufacturers selling through distribution, but for direct-selling manufacturers and service providers as well.

PILOT PROCESS

- Manufacturers, distributors and GPOs were grouped
- Suppliers confirmed which data fields were immediately available
- Suppliers confirmed which data fields they could provide
- Suppliers provided sample data for applicable use cases

RECOMMENDATION

- Suppliers review toolkit with internal stakeholders
- Manufacturers and distributors should initiate conversations with GPO on feasibility and timing
- Educate stakeholders that adoption will take several months to implement
- HIDA and workgroup members will plan to host education sessions
- HIDA members interested in this initiative or for more information, please contact lemmert@hida.org

Managing Through Major Shortages

Collaboration between trading partners is the key to success, panelists say at HIDA's Supply Chain Visibility Conference

The pandemic caused demand to skyrocket for many types of medical products, from PPE to lab supplies to freezers. Supply chain leaders from 3M Health Care, Mayo Clinic, and McKesson Medical-Surgical shared with HIDA SVP Elizabeth Hilla how trading partners worked together to manage shortages, and how their pandemic experiences helped them become even better prepared.

KEY TAKEAWAYS FROM THE EXPERTS

- Work with clinical staff to conserve PPE early
- Pre-identify critical products and substitutes
- Establish clear channels and triangulate (provider-distributor-manufacturer) for alignment
- Increase company flexibility and agility
- Support more domestic and near-shoring manufacturing
- Use current healthcare distribution channel to get PPE to customers
- Recognize supply chain systems aren't designed for manual mode
- Develop more tools for efficient information sharing

Best Practices In Allocation Management

HIDA working group identifies top themes of communication and transparency among stakeholders

The pandemic spurred the medical products industry to look for ways to improve allocation, a critical tool for managing product supply during a shortage or expected shortage. At HIDA's Supply Chain Visibility Conference, a HIDA working group shared initial takeaways from their work developing best practices in allocation management for healthcare supply chain partners.

AMONG THEIR OBSERVATIONS:

- Distributors are positioned to best manage allocations to providers
- Manufacturers' strength is managing product flow into channel
- Ongoing dialogue is necessary to adjust to shifting customer and market needs
- Organizations receiving allocations want to know product quantities not allocation percentages in order to plan effectively
- Any disruption in allocation quantity needs to be shared promptly
- · Stakeholders who "over-communicated" during the pandemic were the best partners
- All stakeholders should put processes and recommendations in place to deal with future events
 - Interested in getting involved in the Healthcare Supply Chain Collaborative? Contact lemmert@hida.org



Christine Arme 3M Health Care



David Hovan McKesson Medical-Surgical



Bruce Mairose Mayo Clinic

"We all had to be agile, and evaluated product at the SKU-level sometimes by the hour in order to adjust allocation and preserve inventory."

Renee Boyle-Gregorek,
 Working group member,
 Henry Schein



Connecting With Capitol Hill

Washington Summit Amplifies Importance Of U.S. Preparedness And Response

HIDA's annual Washington Summit gave supply chain leaders a crucial opportunity to help Congress understand key issues affecting the industry and its care provider customers.

More than 60 HIDA members and their manufacturer partners met with U.S. senators, House members, and staff as part of the summit in June. During more than 80 meetings, HIDA members urged congressional support for the Medical Supplies for Pandemics Act, legislation which will better prepare the U.S. for public health emergencies and strengthen the partnership between the Strategic National Stockpile (SNS) and commercial distributors.

During the Summit, HIDA members heard from Reps. Elissa Slotkin (D-MI) and Richard Hudson (R-NC) about bipartisan long-term pandemic policies. White House Supply Chain Coordinator Tim Manning offered the Administration's views on public-private partnerships and the SNS. Here are some of their thoughts.

Impactful policy and legislation are more important than ever as the nation navigates through the COVID-19 pandemic



Nation's COVID Supply Coordinator Sees Success Through Public-Private Partnerships



Tim Manning White House

The Biden Administration wants to work with the commercial sector to procure and deliver vaccines, personal protective equipment, and diagnostics across the country, according to the White House National COVID-19 Supply Coordinator.

Speaking in June at HIDA's Washington Summit, Tim Manning said the Administration's priority has been getting critical medical products and equipment into the hands of responders and caregivers while ensuring there is adequate supply.

In late December 2020, when Manning was tapped to join the Biden Administration, the devastation of the pandemic was at its height in the U.S. The scale of loss matched the September 11, 2001, terrorist attacks day after day, he noted. Manning, who served eight years as FEMA deputy administrator during the Obama Administration, is encouraged by the progress the nation has made in fighting the spread of COVID-19. He highlighted the 10-fold reduction in cases since mid-January 2021, but noted that the U.S. pandemic isn't over until the global pandemic is over.

Building public-private partnerships is critical and helps the government take a holistic approach to combating the spread of COVID-19, according to Manning. The government has been reviewing ways to work with distributors and manufacturers to achieve its supply chain objectives.

MANNING SAID THE PUBLIC HEALTH EMERGENCY HAS PROMPTED THE NEED TO:

- Review government procurement
- Create a new vision for the Strategic National Stockpile (SNS)
- Find more ways to support U.S.-made products
- · Consider macro policy needs to support these efforts

The administration plans to help expand the country's domestic manufacturing base by subsidizing production, making investments in surge capability, and helping maintain production lines that can scale up in a crisis.



Creating Policy Through Lessons Learned From A National Pandemic

Two lawmakers championing ways to better prepare the nation for public health emergencies outlined bipartisan efforts on long-term pandemic policies and what navigating through COVID-19 has taught them.

U.S. REP. ELISSA SLOTKIN (D-MI)



- U.S. supply chains and the Strategic National Stockpile are matters of national security
- The sources of U.S. supplies are important
- The government should incentivize U.S. manufacturing
- The public and private sectors must collaborate to achieve success

U.S. REP. RICHARD HUDSON (R-NC)



- Private providers should more easily be able to replenish the SNS
- Using the SNS as a storehouse for everyone isn't sustainable
- Congress should establish a grant program for states to maintain stockpiles
- Funding should be increased to strengthen supply chain public-private partnerships

"One question manufacturers and distributors should ask themselves: Do you feel confident that you have transparency throughout your supply chain and is your supply chain actually secure?"

— Rep. Elissa Slotkin



COVID's Impact Accelerates ASC Growth

The ASC footprint continues to grow with lower-cost, high quality procedure options



The COVID pandemic, coupled with significantly lower costs of procedures when compared to a hospital setting, are propelling extraordinary growth in ambulatory surgery centers (ASCs), according to the *COVID-19: Impact on ASCs* e-book by Clarivate.

Before the pandemic, reimbursement policies, improved patient outcomes, and advances in minimally invasive treatments were already fueling ASC growth. Then came COVID, which led many hospitals to temporarily stop elective surgeries. ASCs were also impacted by lockdowns and infection-mitigation measures, but were still able to take on many procedures that would typically have been performed in a hospital setting. As a result, ASCs have been deemed to be efficient and adaptable sites of healthcare during the pandemic.

Further promoting the shift is the continued expansion of payer incentives for ASCs and outpatient settings. In particular, in late 2020, CMS proposed significant changes to reimbursement structures, including removing about 300 musculoskeletal-related services from the inpatient-only list, bolstering ASC reimbursement by 2.6%, and expanding the ASC-payable list in 2021. Notably, CMS now plans to eliminate the inpatient-only list by 2023, signaling it will likely move to eliminate the ASC-payable list as well, further expanding reimbursement for ASCs, according to Clarivate.



Many procedures such as knee arthroscopies and colonoscopies cost **nearly 50% less** in ASCs than in a hospital setting.

Source: Becker's ASC Review

WHY ASCs ARE IN DEMAND:

HIGH QUALITY CARE with LOWER COST to patient and payer

LOWER RATE OF INFECTION than hospitals

FLEXIBLE SCHEDULING for patients and care providers

High patient **SATISFACTION**

LOWER READMISSION RATES than hospitals



KEY REASONS FOR ASC EXPANSION DURING THE PANDEMIC

1

CMS reimbursement to allow more procedures to be performed at ASCs, as well as proposed elimination of the inpatient-only list.

2

Temporary exemptions from CMS have allowed ASCs to handle procedures such as trauma care that traditionally have been performed at hospitals.

3

ASCs are generally smaller than hospitals and many were able to more quickly create new safety processes and procedure-prioritization models, allowing them during the pandemic to take on procedures normally conducted by hospital outpatient departments, according to Clarivate.

4

Continued patient concerns over possible COVID infections have driven many patients to seek out services at ASCs rather than hospitals for the first time.

POTENTIAL CHALLENGES TO ASC GROWTH TRENDS

- 1. ASC expenses may grow as available procedures expand and costs rise
- 2. ASCs will need to continue investing in sterilization and personal protective equipment (PPE), which will add costs and affect internal processes
- 3. ASC settings have relatively small capacities and still handle a limited amount of procedures, compared to hospital systems

Data and insights included in this article were extracted from the COVID-19 Impact on ASCs e-book by Clarivate.

Unlocking The Benefits Of Blockchain

This advanced technology is already being used in a wide variety of industries to strengthen trust between trading partners

Healthcare industry leaders have often discussed whether blockchain technology could be a game-changer for pricing alignment among manufacturers, distributors, GPOs, and providers. In theory, by creating a single accurate ledger of contract information that all parties can rely on, disputes can be minimized. A wide variety of industries already have implemented blockchain technology within their supply chains, including the oil and gas, seafood, and home improvement industries. Now, the technology is being put to the test in the pharmaceutical industry.

At HIDA's Contract Administration Conference, participants in a pharma industry pilot project discussed what they've experienced and how the medical products supply chain could learn from it.

They highlighted benefits of blockchain when managing contracts between healthcare trading partners:

- Avoids mismatches in customer identification, eligibility, and pricing
- Enables manufacturers to enforce validation rules on rosters before GPOs share them
- Provides an accurate time-stamp on pricing notifications
- Ensures real-time pricing synchronization among multiple trading partners

Panelists agreed some of the major benefits to blockchain technology include attaining an upfront agreement of what the contract should be: having the ability to set up contract rules, and having better customer visibility.

Q. What is blockchain technology?

It's a shared, immutable ledger for recording transactions and tracking assets in a business network.

Q. What does it do?

Anything of value can be tracked and traded on a blockchain network. It can track orders, payments, accounts, production and more. Network members see a single view, offering all details of a transaction end-to-end.

Q. What are its benefits?

Blockchain provides immediate, shared and transparent information stored on a ledger accessible only by network members who have permission to access it. Transactions are recorded only once and no participant can change a transaction after it's been recorded to the shared ledger. Source: IBM



TECHNOLOGY



Reinventing Distribution's Value After The Pandemic

Distributors' COVID-19 experiences strengthen their role as trusted partners to providers and government

The pandemic forced healthcare distributors to perform at a higher level than ever before, according to leaders from Concordance Healthcare Solutions, MAC Medical and Owens & Minor speaking at HIDA's Executive Conference. In a panel discussion, "Reinventing Distribution Value, Post-Pandemic," executives agreed that the COVID-19 experience will drive permanent and positive changes in the healthcare supply chain. Here are some of their insights.

THE ROLE OF THE DISTRIBUTOR EVOLVED DURING THE PANDEMIC

- Distributors were called upon to vet suppliers and identify fraudulent brokers
- Distributors, working through the commercial and public sectors, delivered critical, life-saving products to COVID hotspots
- Distributors' key role throughout the supply chain and their value to the healthcare industry has been amplified
- Distributors now participate with a higher level of government decision-makers

DISTRIBUTORS CAN EXPECT CHANGES POST-PANDEMIC

- The public/private partnership between distributors and government will grow and strengthen
- The supply chain will become more diverse, including strengthening U.S. manufacturing
- Customers will look for a greater mix in their distribution with diversification
 of supplier and manufacturer partners
- Supply chain transparency will continue to be a major focus for all partners
- Partnerships will broaden between distributors and manufacturers who are new to the healthcare space
- The importance of good data exchange will accelerate

HEALTHCARE PROVIDERS WILL BE MORE PROACTIVE

- They will look to diversify product sourcing
- They will seek end-to-end solutions with their deeper understanding that "distribution" includes complex logistics
- Hospitals and other care settings will continue to stockpile critical medical supplies



Gina Marchese Concordance Healthcare Solutions



Jeff Jochims Owens & Minor



Mara Maddocks MAC Medical





MEMBER INVITATION

Save The Date: December 1, 2021 | 1pm ET

Whether you're brand-new to HIDA or just need a refresher on all the great benefits available, please join us for a virtual orientation of HIDA's great resources. Come meet other members and get to know the membership team. Learn about the tools and resources available to you and how to connect with other members.







RESOURCES



Vaccine Market Report:

The 2021 Vaccine Market Report analyzes major market trends impacting the vaccine industry and discusses key vaccines already in the market including COVID-19, flu, adult, children, adolescent and travel vaccines.



Post-Acute Market Report:

The 2021 Post-Acute Market Report summarizes the significant challenges faced by post-acute facilities during the pandemic, analyzes current trends, and discusses the path to recovery over the next several years.

For more information, visit HIDA.org/MarketReports

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- Daily Clips
- Healthcare Supply Chain Collaborative
- MKTBrief | Medical Product Updates By Category
- Independent Advisor



GPO Administrative Fee Reporting Toolkit

In a step toward greater pricing alignment throughout the healthcare supply chain, a new GPO Administrative Fee Reporting Toolkit was developed by a HIDA workgroup. This template offers a standard format for group purchasing organizations to receive administrative fees from their contracted supplier partners, saving companies time and improving pricing accuracy.

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HIDA's Must-Read News

A selection of key articles addressing changes affecting the healthcare industry



A first-in-human trial of an influenza vaccine designed to provide long-lasting protection against multiple flu virus strains has begun, according to the National Institutes of Health (NIH). The universal influenza vaccine could one day eliminate the need for an annual vaccination by generating antibodies to protect against existing or emergent influenza virus strains.



The coming flu season may be a doozy. Even as coronavirus was devastating populations around the world, doctors noticed something else was missing: There was almost no flu. Many experts believe that measures taken to help control coronavirus also prevented the spread of influenza. It's also possible that coronavirus somehow outcompeted or interfered with flu. Either way, experts think the lull in flu activity is only temporary. They caution that when influenza returns, likely this fall, it will be with a vengeance.



More jobs were created in the U.S. due to reshoring in 2020 than were created by foreign direct investment for the first time since 2013. Reshoring created 109,000 U.S. jobs out of 161,000 total jobs created from reshoring and foreign direct investment in 2020. Companies saw benefits in being closer to customers and markets, government incentives, and available skilled workers. Medical equipment and supplies, the second-largest job creation group, made 21,000 new U.S. jobs in 2020 compared to 3,000 the year before.



Imports of personal protective equipment (PPE) are slowing down this year as COVID-19 positivity rates in the U.S. decline, but demand for gloves — and the expedited ocean shipping services that carry them — will remain strong as long as vaccinations continue, according to freight forwarders who book these products.



A healthcare provider's cybersecurity strength is becoming as important to consumers as their provider's location, fees, and insurance network. A recent study found that 27% of patients would switch providers if their healthcare provider fell victim to a cyberattack — that's a nearly 30% increase from the same study the previous year.



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How You'll Benefit

- Gain insights on market trends and opportunities in a post-COVID world
- Advance your sales skills and strategy
- Understand changing customer needs
- More effectively engage and persuade executive-level decision-makers
- For team leaders: better prepare your team for today's customer challenges, and hone your own management skills

Who Should Attend

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