



Framework for Change

Centenary



The Pharmacy
Guild of Australia



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**The Pharmacy
Guild of Australia**



19 March 2021

Dear Guild Member

Securing the future of community pharmacy: developing your Framework for Change

The community pharmacy of the future is not a pharmacy as we understand and use that term today – it is a community health hub that builds on a core expertise in medicines and facilitates the provision of an array of essential, cost-effective health products and services to an empowered and informed patient and consumer. The Guild's vision for our future is to serve the needs and preferences of patients and consumers through a vibrant, dynamic and commercial community pharmacy network.

In order to provide these health solutions, Framework for Change will embrace an innovative, service and care-oriented business model which is commercially resilient and builds upon the opportunities provided by technological advancement and the inherently trusted role of community pharmacies in Australia's health system.

Lessons learnt from the evolution of pharmacy internationally inform this thinking. However, a plan for the long-term future of pharmacy must be attuned to the Australian health landscape and position community pharmacies to succeed in a way that is less dependent on the traditional medicines supply role through the PBS. Pharmacies' core focus will expand more into medication advice, management and safety, reflecting the unique skills of pharmacists as medicines experts.

It is critical that any future strategic plan for community pharmacies is fully informed by the views of patients, consumers, pharmacy owners and their staff, pharmacy academics, researchers and students, and key stakeholders. This is why this project is supported and guided by a rigorous market research program and widespread stakeholder consultations.

Further information on the Framework for Change project is available at www.guild.org.au. If you have queries in relation to this project, please contact the Guild on 13GUILD (13 484 53).

Yours sincerely



Trent Twomey
National President



Suzanne Greenwood
Executive Director

The Guild's vision is for community pharmacy to serve the needs and preferences of patients and consumers through a vibrant, dynamic and commercial community pharmacy network.



What is this Framework for Change?

This document provides a summary of the Guild's strategic thinking (assisted by Pottinger and ORIMA), an explanation of nine growth pathways, and an outline of practical actions to enable community pharmacies to achieve longer term success by delivering health outcomes for their patients and consumers.

The overall objective is to help community pharmacies understand and be in a position to respond to the trends impacting their businesses in a way that makes the most of the opportunities that lie ahead.

The Guild is committed to working with its members and the broader pharmacy sector on this future journey, while continuing to advocate on the issues that will enable community pharmacy to build on its vital role as a trusted custodian of the National Medicines Policy.



The **core medicines role of community pharmacy** is changing

The trends impacting the medicines role of community pharmacy

Major health trends are fundamentally impacting the core medicines role of community pharmacy. Scientific advances are transforming how medicines are used to prevent, treat and manage health conditions. Health funding and delivery models are evolving in response to changing patient needs and expectations, with an increased focus on health outcomes, integration and collaboration between health professionals, and the intelligent use of digital technologies and data.



Medicines trends

- ✚ Growth in complex molecules and personalised medicines
- ✚ Prevalence of biologics and other new drug therapies
- ✚ Focus on vaccines to prevent and manage disease
- ✚ PBS focussed on high cost medicines and concessional patients
- ✚ Changes to medicines supply and distribution

Patient trends

- ✚ Higher number of patients with multiple chronic health conditions
- ✚ Ageing patients living at home longer and requiring care
- ✚ Increased focus on wellness and wellbeing
- ✚ Unprecedented access to health information
- ✚ Ongoing challenge of medicines misuse and misadventure

Funding models

- ✚ Funding models encouraging integration and collaboration
- ✚ Remuneration for efficient patient outcomes rather than inputs
- ✚ Medicines and patient care moving out of hospitals into the community
- ✚ Increase in targeted, localised funding
- ✚ Funding is evidence based with focus on partnerships

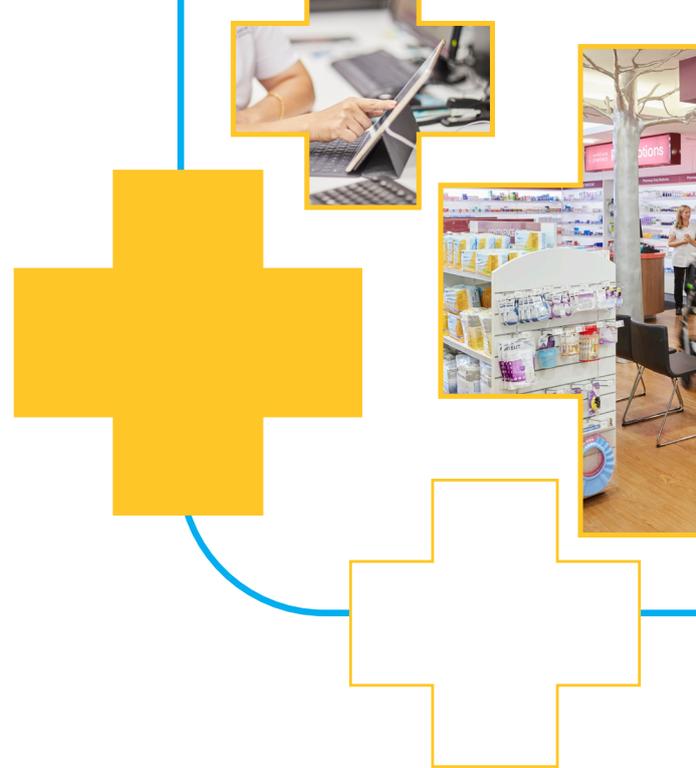
Health service delivery

- ✚ Whole-of patient solutions and care pathways
- ✚ Coordination between health providers and across care settings
- ✚ In-home and online patient interactions
- ✚ Health professionals at full scope of practice
- ✚ Integration of digital health records and other digital technologies

These **trends** translate into **medicines related opportunities**

The medicines expertise of community pharmacists will come to the fore

The core medicines role of community pharmacists will evolve from the current focus on dispensing to medicines experts entrusted to deliver individualised health outcomes for their patients through a combination of medicines supply, advice, support, management and safety, working in collaboration with other health professionals.



Enhanced medicines role for community pharmacy

Medicines

- ✚ Experts in biologics, biosimilars and specialised medicines
- ✚ Support with patient self-administering devices
- ✚ Pharma-covigilance and medicines safety
- ✚ Clinical trials and private prescriptions
- ✚ Adverse reaction recording and reporting
- ✚ Controlled drugs and staged supply
- ✚ Medicines related screening, point of care testing and pharmacogenomics
- ✚ Opioid replacement therapies and addiction support
- ✚ Compounding and infusion preparation
- ✚ Support for disadvantaged population groups
- ✚ Dispensing and administering of vaccines
- ✚ Medicines access and support for palliative care

Digitisation

- ✚ E-scripts and digital fulfilment
- ✚ Script reminders and patient medicines apps
- ✚ Medicines monitoring devices
- ✚ Clinical applications enabled by digital health records
- ✚ Digitally enabled collaborative medicines care
- ✚ Digitised consumer medicines information

Services

- ✚ Personalised medication support plans
- ✚ Medication management
- ✚ Medicines reconciliation during care transitions
- ✚ Medicines packing and home delivery
- ✚ Curated medicines lists
- ✚ In-home, community and residential care
- ✚ Medication chart dispensing
- ✚ Medication continuance
- ✚ Poly-medicine support
- ✚ Advanced clinical interventions
- ✚ Adherence services
- ✚ Prescribing for minor ailments



Market research supports the Framework for Change Strategy

This project has been supported by extensive market research

This market research has been undertaken to ensure that this Framework for Change reflects the views of pharmacy owners and employees, pharmacy students, and, importantly, patients.

The results from the thousands of survey respondents and focus group participants confirm that the future opportunities arising from the growth pathways match the needs and preferences of patients, and are strongly supported.

“The proposed growth pathways align with patient needs and expectations”

Community pharmacy owners, patients, staff and students identified a number of needs and expectations that align with the growth pathways, including:

- Pivot to a services focus
- Optimism for the future of community pharmacy, driven by opportunities from technological advances and the ageing population
- Most owners identify their financial performance to be weaker than five years ago and identify the need to reduce costs, increase business skills and back-end efficiencies

Download the research: www.guild.org.au





Long-term themes to consider

Community

Chronic disease and an ageing population will drive future health needs, including where and when care is required. New models of care are emerging, creating opportunities for community pharmacies, including as local points of access for health and wellness services.

Economics

New competitive forces are emerging, including in online retailing. Major players from within and outside the health sector are encroaching, driven by growth opportunities and technological advances. Medicines supply is becoming commoditised and sustainable funding models for pharmacy services are still evolving.

Policy

Government finances will remain under pressure with a focus on reducing hospital costs. Commitments to enhance Australia's health and welfare systems, like the NDIS, are important but will add to cost pressures. Governments will continue to look for "more for less" and will increasingly fund outcomes rather than inputs.

Health system

Health care is becoming more patient-centric with an increased focus on cost-effectiveness, collaboration and integration, and care pathways, enabled by enhanced digital access to information. Community pharmacies can be the medicines experts in an integrated care team, but may also be disrupted.

Product

Dispensing contributes over 60 per cent of pharmacy revenues, but the lack of growth highlights the downward pressure on this core revenue stream. Many front-of-shop products will experience strong competition, including through online channels, with potential growth in wellness and wellbeing.

Services

The broad shift to services will continue across the economy as a whole, and particularly in health care. This is an opportunity for community pharmacy to value-add, leveraging its accessibility, expertise and trust, as long as effective business models can enable sufficient income to be earned.

Technology

New technologies will empower consumers, enhance service delivery and drive greater cost efficiency, both in medicines and in health more broadly. This creates both opportunity and risk for community pharmacies, and will increase the overall rate of change. The smart use of health data will become increasingly important.

Engagement

Over time, digital health will break down health siloes and enable partnership-based approaches that span primary care, allied health, community care and aged care. Knowledgeable consumers will demand health care where and when they need it and will expect coordination and communication between providers.

Considering all the options

In considering the future of community pharmacy, the growth pathways leverage pharmacies' core capabilities, but areas of perceived current weakness did not constrain the range of choices considered. All ideas that were logical and fit within practical or natural limits were explored in the Framework for Change project.



Nine **growth pathways** to long-term sustainability



What does this mean for community pharmacy?

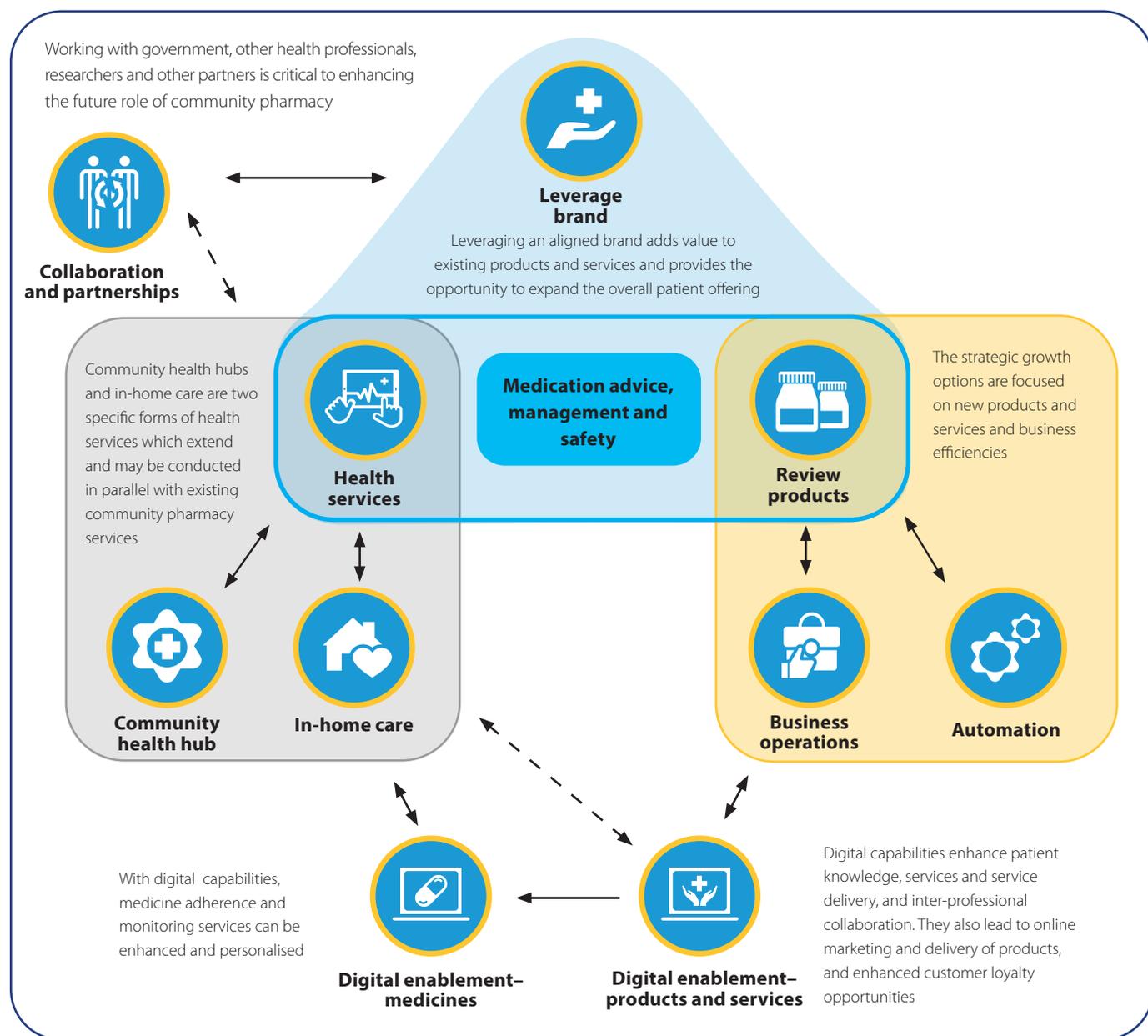
As community pharmacies develop their future business strategies, it is important that they understand their changing operating environment and the opportunities afforded by the growth pathways. Many of the individual pathways are connected and need to be brought together in a coherent whole-of-business implementation plan. The level of interaction between the growth pathways is explained on the next page.

How the **growth pathways interact** and **connect**

How do the growth pathways connect?

The community pharmacist's role is evolving from general medication supply and advice to more personalised medication related advice, support, management and safety. While the safe dispensing of medicines will remain a fundamental aspect of pharmacists' role, the trend towards more complex and individualised medicines will change how community pharmacies deliver Quality Use of Medicine outcomes and broader health solutions for patients.

This trend underpins the interdependencies between the growth pathways as community pharmacies play an increasingly important role in the delivery and management of health care.





Workforce will drive the success of the growth pathways



Pharmacy students and interns



Pharmacists



Pharmacy Assistants

Curriculum

Build a standardised, tertiary curriculum that ensures deep understanding of current and future pharmacy practice. Impart students with the knowledge and skills to demonstrate autonomy, authoritative judgement, adaptability and responsibility as an expert and leading practitioner

Technology

Improve the understanding of health technology such as remote monitoring, point of care devices and integration of the My Health Record as the patient-pharmacy relationship moves from transactional to care-based

Services and retail

Broaden the skills of the workforce to provide health advice and services focusing on the increasing complexity of medicines and health conditions. Train staff on new retail practices relating to products and channels

Training and development

Vocational training for pharmacy assistants that ensures a broad range of cognitive, technical and communication skills and the capacity to demonstrate autonomy, judgement and defined responsibility under the supervision of a qualified pharmacist

Automation

Improve the understanding and command of robotics and artificial intelligence to free up time from administrative work, especially for pharmacy assistants. More time for human interactions fosters the development of care, support and advisory roles

Other health professionals

Build understanding of the connections with the wider health system. Increase the awareness of pharmacy as a health provider through primary care and allied health integration

Medicines

Develop standards to be recognised as the clinical destination for specialised medicines administration. Pharmacist upskilling is required for complex medicines as dispensing will remain at the core of pharmacy, with biologics and immunotherapies more widespread

Remuneration

Ensure long-term wage sustainability in pharmacy. Pharmacists delivering medication related services should be reimbursed commensurate with other health professionals delivering equivalent services

Aged care, disability and mental health

Up skill pharmacists to safely advise and manage poly-medicines use and multi-morbidity which will be required due to Australia's ageing population

Research and data

Provide training and time to allow pharmacists to undertake research into medicine and health trends, patient care and technology. Open data sharing and platforms will empower pharmacists as healthcare professionals

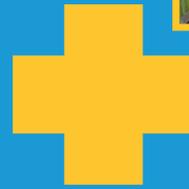
Finance

Strengthen financial literacy to improve decision-making by owners through business planning and operational efficiencies

Organisational design

Refocus workflows on patient interaction, communication, advice and services





The Framework for Change Growth Pathways





Health services

What is the pathway?

Increase the provision of health-related services in the pharmacy, including, but not limited to:

- Personalised medication advice, management, monitoring and safety
- Chronic disease support
- General health advice, including preventative health and point-of-care testing
- Disease screening and risk assessment
- Vaccinations

Why make the change?

Expanding subsidised and patient-funded health services will demonstrate your pharmacy is a health destination and open up new revenue streams, reducing your dependency on medicines supply. Services that enhance patient convenience and health outcomes or which reduce patient out-of-pocket costs and increase the overall efficiency of the health system will be welcomed by patients, stakeholders, other health providers and funders alike.

The opportunity for pharmacies

The Guild will continue advocating for an enhanced role for community pharmacy in primary care, focusing on evidence-based services that complement pharmacies' core medicines role. These services may be funded from community pharmacy agreements, broader government funding sources, private providers or patients, with market research showing patients are willing to pay if they see value in the services offered. Individual services may vary between pharmacies depending on local needs. Establishing the in-pharmacy infrastructure and systems to deliver services (e.g. consultation rooms, recording, booking, referral and payment platforms, trained staff) will enable pharmacies to maximise services opportunities and establish themselves as health destinations.

What happens if I don't make the change?

If community pharmacies do not proactively look to meet their patients' needs for health services, then others will do so, potentially restricting pharmacies to medicines supply and broader retail, both of which are susceptible to funding pressures and increased competition. Without services, community pharmacies have less ability to differentiate and build patient loyalty as they compete solely on price and convenience.

You are not alone – champion story

Elise Apolloni – Capital Chemist, Canberra, ACT

Elise is widely recognised as a leader in the introduction of professional services in her community pharmacy and she understands just how important these are to the pharmacy business, staff and patients.

Capital Chemist provides mental health first aid, medical grade consultation rooms and diabetes education. Equipping staff with the necessary training and professional skills has been essential, but it has paid off as members of the community go out of their way to visit Elise's pharmacy.

Elise believes that the health services pathway provides an optimal opportunity for continuous improvement.

"At the end of the day community pharmacy is about the community and people. When you put the patient at the front you will innovate and create a health care destination providing the services that fulfil their needs."



Pathway change plan



Market research

Patients strongly support expanded health services in community pharmacy. Some 58 per cent say they would probably or definitely use pharmacies for their health services needs, and 49 per cent indicate that these services would make them use pharmacy more frequently. Over half of patients support paying for expanded health services. Services of most interest are those related to testing, monitoring and vaccinations, including annual flu shots.

Quick wins

Research what primary health services your pharmacy could provide which have a high level of patient demand but are not currently readily accessible in the local community.

What can I do now?

- Research what primary health services may have high local patient demand but are not readily accessible
- Talk to your patients, analyse your dispensing and point of sale data and study local population health data
- Consider the infrastructure and staffing required to deliver health services in your pharmacy
- Conduct initial planning, establish budgets, discuss with your team how you will market your services
- Develop standardised systems, processes and materials for booking, delivering and recording health services
- Understand and organise the resources and training required for the provision of new health services
- Run trials to test patient demand and potential pricing, collaborating with GPs and other health providers
- Consider trialling extended trading hours or offering after-hours appointments to meet patient care needs
- Consider acquiring point of care testing devices and other equipment to enable service provision
- Put in place an evaluation plan

Who do I talk to?

Talk to your local Guild Branch to utilise relevant business support tools, including the Guild's Opportunity Analysis. Go to the myGuild portal to access the Pharmacy Viability Tool.



Community health hub

What is the pathway?

Establish the community pharmacy as a community health hub for delivering a variety of health services using consultation rooms that can be utilised by other health providers such as nurses, psychologists, mental health counsellors, diabetes and asthma educators, occupational therapists, social workers, podiatrists, nutritionists and dieticians who may be contracted on a sessional basis or employed as pharmacy staff. This pathway involves:

- Enabling the pharmacy to become a community health hub
- Demonstrating the viability of transforming into a community health hub
- Partnering with health providers and/or training existing staff to implement a community health hub

Why make the change?

To a varying degree, community pharmacies already contract other health professionals such as maternal nurses and diabetes educators on a sessional basis. With physical retailing under pressure and an increased focus on multidisciplinary care, pharmacy infrastructure can be utilised for broader health services without necessarily entering those markets directly or employing full time staff. Other health professionals working on a sessional basis can complement pharmacists' medicines role, enabling a holistic, health solutions based approach.

The opportunity for pharmacies

Pharmacies can enable a broader shift to health services by reconfiguring retail space into consultation rooms, which are made available to other health professionals on a sessional basis. The focus can be on unmet local health needs in areas of health expertise for the pharmacy (e.g. diabetes, asthma, child health, mental health).

Pharmacies that take this approach can attract patients from outside their normal geographic footprint. Depending on who they partner with, such arrangements can enhance access to the MBS and other revenue streams as well as health products. There is a low cost to building relationships with other health professionals and inviting them to practice in your pharmacy, which will enhance their access to patients and reduce their infrastructure costs.

What happens if I don't make the change?

Patients, especially those with chronic health conditions and co-morbidities, who have to deal with multiple health professionals value the convenience of a 'one stop shop'. The small amount of space/investment required means this is an opportunity that equally can be capitalised upon by other health care providers, who may decide to include pharmacists in their health offering, potentially undermining the core medicines role of your pharmacy.

You are not alone – champion story

Swarup Afsar – Pharmacy 777, Nollamara, WA

The development of pharmacy health hubs gives community pharmacies the opportunity to take their delivery of professional services to the next level of patient care.

Pharmacy 777 sets itself apart by focusing on imparting knowledge rather than selling products. Speaking to local doctors, Swarup identified an unmet local need for mental health services, so he hired a counsellor and psychologist and built two consulting rooms. Swarup also hosts mothers' groups and engages with the community outside the pharmacy, visiting schools, bowling clubs and general practices.

"The key part of community pharmacy is community. Every community is different and finding where your pharmacy fits in is essential for developing the health hub that best serves your patients. Everyone walking through your door must be considered as a patient, not a customer."



Pathway change plan



Market research

This pathway is received favourably by patients. Some 34 per cent strongly support and only one-in-ten strongly oppose. Nearly half (47 per cent) would 'probably' or 'definitely' use pharmacies in this way. Patients are attracted to GPs operating out of community health hubs and there is considerable support for providing access to various allied health professionals.

Quick wins

Consult with local health professionals and community organisations to identify areas of unmet health needs. Find partners to help deliver health services out of your pharmacy or consider investing in training your existing staff.

What can I do now?

- Contact your local health providers, including GPs, allied health professionals, community organisations and Primary Health Networks (PHNs) to gain insight and understanding
- Identify health needs and gaps in your community, including by talking to your patients
- Undertake some initial planning. Establish a budget. Talk to your team and ensure they are aware of your plans and identify any need for additional training
- Identify and meet with local health professionals to ascertain interest in potential sessional work
- If necessary, look to build a consultation room, ensuring it meets the relevant clinical practice requirements
- Focus in health areas that will add value to your existing services/products or will broaden your existing offering
- Make sure your staff are aware of the services so they can advise patients. Set up booking and referral systems
- Develop joint marketing activities with your health partners to promote the new services in the community

Who do I talk to?

Talk to your patients and local health professionals who could derive mutual benefit from working with you. If your pharmacy is QCPP accredited, utilise the relevant QCPP business plans and checklists.



Digital enablement

What is the pathway?

Integrate digital health into the community pharmacy practice and embrace digital technologies as a whole-of-business enabler. Priorities for development include:

- Integrating digital health records into your pharmacy's clinical practice
- Utilising digital platforms to improve medication advice, management and safety
- Enabling pharmacy with basic digital functions such as search engines, maps and a social media presence
- Developing online retailing channels for front-of-shop products

Why make the change?

Digital technologies are a fundamental enabler (e.g. digital engagement with patients to improve medicine adherence, remote monitoring, digitally enabled screening and point of care testing). Integrating digital health into pharmacy practice enhances patient safety, enables more personalised care, creates clinical efficiencies, and drives collaboration. Online retailing is increasingly important to compete with discounters and online retailers.

The opportunity for pharmacies

Digital health will integrate the core medicines expertise of community pharmacy with the wider health system. Increased knowledge sharing, data analytics, tele-health and virtual health will enhance this collaboration.

Electronic scripts, prescription exchanges, automated medicines packing, and data-driven medicines interventions will increase the amount of community pharmacists' time spent on patient care rather than administrative tasks.

The introduction of online retailing channels will open up new sales opportunities for community pharmacy. Given the dynamic nature of online retailing, the initial volume and type of sales may be volatile and hard to predict.

What happens if I don't make the change?

Unless community pharmacy embraces digital health it cannot integrate with the wider health system, reducing its ability to move beyond medicine supply. It will be less able to offer personalised health solutions working with other health providers. If pharmacy does not have a competitive online presence, it is more open to the risk of online retailers providing direct-to-home prescriptions and targeting front-of-shop products.

You are not alone – champion story

Cathie Reid – Epic Pharmacy, South Brisbane, QLD

Cathie is on the cutting edge of pharmacy innovation due to her deep experience and skill set. She knows that digital prescribing, digitally enabled health applications and wearables have a role in the pharmacy of the future, especially in relation to enhancing medication adherence and safety. If pharmacy is proactive in ensuring it has a place in the new digital health landscape, Cathie knows it can continue to be a successful healthcare destination.

Cathie believes that data presents currently unheralded opportunities for pharmacists and their patients. To take advantage, pharmacists need to understand the role data plays and adapt the way they engage with their patients.

"If Australian community pharmacy is not prepared to ensure they are digitally enabled, doctors and nurses will take this space. Even if people don't know about new technologies it doesn't mean they will not become mainstream. This can happen extremely quickly, and it is essential to be proactive."



Pathway change plan



Market research

Digital enablement is positively received by patients with most (57 per cent) indicating they would use pharmacy digital and online tools. However, there is a low willingness to pay more for online or digital services or enablement (29 per cent strongly oppose any fees) as patients like the concept but do not perceive it to be a value-add that pharmacies can justify as a fee paying service.

Quick wins

Register for the My Health Record.

Ensure your pharmacy is listed on **findapharmacy.com.au** and Google's search engine and maps at: **google.com/business/**

What can I do now?

- Get started! Digital enablement is less daunting if you make it part of your everyday decision making
- If you haven't done so, register for the My Health Record and identify how it can be used to enhance clinical practice in your pharmacy
- Check that your pharmacy's details are up-to-date on the myGuild member portal. This will ensure your location, opening hours and services are correct on **findapharmacy.com.au**
- Ensure your pharmacy is listed on Google's search engine and maps by going to **google.com/business/** and following the steps on the front page
- Ensure that your pharmacy's data is secure and that you have cyber insurance
- Investigate template websites and fulfilment platforms (online e-commerce offerings) and identify how best to deliver online orders, including self and partner-fulfilment models
- Put in place an electronic services recording platform, if possible integrated with the broader digital health system
- Set up a services booking system and integrate with your website
- Implement a script reminder service (via text or email) using a 3rd party application
- Investigate what stock you will sell online, pricing and how you will integrate with your POS
- Develop a digital marketing and social media plan and train your staff in the use of digital media tools
- Identify possible online trading platforms to sell your products into new markets

Who do I talk to?

Go to **myhealthrecord.gov.au/for-healthcare-professionals/community-pharmacy** to register for the My Health Record. Seek advice from Gold Cross on how to build a website. Talk to GuildLink about their digital platforms.



Business operations

What is the pathway?

Improve back office operations to streamline business processes, including supply chain and product ordering, integration of dispensing, services and retail systems, leasing arrangements, utilities, and payroll and human resource management. Core objectives include:

- Helping pharmacies maximise overall profitability
- Reducing the time and cost associated with back office activities
- Optimising product mix and supply chain efficiencies

Why make the change?

It is no longer realistic in today's pharmacy operating environment to rely solely on the trust and clinical skills of pharmacist staff. Increased cost pressures and competition mean that pharmacies must maximise operational efficiencies if they are to maintain levels of profitability. Cost-efficient, scalable back office processes and systems are essential to enable community pharmacies to compete effectively, including against online retailers.

The opportunity for pharmacies

After cost-of-goods, the major expense lines for pharmacy are labour, rent, fit-out, IT and utilities. Identifying and putting in place systems and processes to deliver efficiencies in each of these areas, can significantly reduce overall operating costs and increase financial resilience. It will also enhance the ability to take advantage of other growth pathways, whilst limiting cost increases.

It is important to develop a whole-of-business approach to determine which areas can deliver the largest efficiency gains for the smallest upfront investment. The initiatives are unlikely to be radical, and hence the associated risks should be relatively straightforward to identify, assess and manage. The effectiveness of the changes that are made are reliant upon them being sustained, systemised, measured and supported by pharmacy staff.

What happens if I don't make the change?

Inefficient systems, processes and procedures leave your pharmacy facing the prospect of unsustainable increases in costs and reduced ability to invest for future growth and withstand threats of disruption. With many pharmacies supported by the expertise of management groups, a failure to focus on overall business improvement may render your pharmacy increasingly uncompetitive and increase the underlying costs of any role enhancement initiatives.

You are not alone – champion story

John Cao – Mount Hawthorn Community Pharmacy, WA

John is optimistic about the future of community pharmacy, but sees the need for owners to recognise the new operating environment they are in, and to make the changes that are needed to prosper in it.

John has applied a number of key performance indicators to ensure his staff (which are divided into teams based on their primary function) work as efficiently as possible. John has a strong focus on maximising net profit growth by being cost efficient. He has used systems including task and inventory management software.

John believes that ongoing business operations monitoring can help owners spot any problems or negative trends.

"One pharmacy cannot cater to every patient segment; we need to make business decisions to please as many patients and customers as we can whilst maximising the store's net profit as a retail and health destination."



Pathway change plan



Market research

Pharmacy owners have a high degree of self-confidence in their business skills with 71 per cent believing they are excellent or good at managing cash flow. However, when asked to assess their capabilities in regard to digital connectivity, innovative products and services, and strategic planning, half or fewer rate themselves as excellent or good. In the face of these threats and opportunities, 44 per cent of owners believe that 'major' or 'fundamentally different' business models are needed going forward.

Quick wins

Consult with your staff and business advisers on opportunities for efficiencies and work with them in developing and putting in place a business improvement plan for your pharmacy.

What can I do now?

- Identify opportunities for efficiencies through observation of processes and workflows, and review of procedures
- Review your quality management systems
- Undertake some initial planning. Establish a budget. Talk to your team so they are aware of your plans and have the opportunity to provide input
- Identify skills and knowledge gaps which may be impacting on the efficiency of your business operations
- Put in place a business improvement plan with systems and allocate responsibilities for implementing it
- Establish key performance indicators that can be tracked to measure performance against industry benchmarks
- Review and evaluate, together with your staff, to track progress so additional changes can be made over time
- Continue investing in your staff as your best business improvement assets, including at the business management level
- Consider whether you could benefit from an expert business adviser

Who do I talk to?

Make sure your pharmacy is accredited to AS85000, a nationally recognised quality management standard for community pharmacies in Australia. Utilise the relevant Guild business support tools. Talk to a recognised pharmacy business adviser.



In-home care

What is the pathway?

Provide a range of medication and other health services to patients in their homes, including:

- Delivering medication related support, including reminders and monitoring services, that increase adherence and safety
- Partnering with other providers in delivering in-home care services for patients that require intensive support or are transitioning between care settings
- Delivering medicines and front of shop products direct-to-home (see also digital enablement pathway)

Why make the change?

Australia's ageing population will need progressively higher levels of in-home care, including medication support and broader health and community services. Community pharmacies can help older Australians live at home longer by providing personalised medication support, working in collaboration with GPs and the broader health team. Community health hubs physically located in pharmacies can be extended into in-home settings. Pharmacies can build on their reputation for convenience through home delivery of medicines and other products.

The opportunity for pharmacies

Personalised medication support can be provided to patients in their homes as well as to aged care and supported residential accommodation facilities. As 'baby boomers' age, they will demand in-home services that meet their individual needs. The focus on consumer directed care provides the opportunity to partner with community care providers to deliver comprehensive in-home support packages. There may be initial uncertainty around consumer responses and whether adequate fees can be charged. However there is likely to be a significant private market, with families willing to pay for personalised care that enables frail aged relatives to stay at home longer. Technology enabled start-ups are also entering this space and may be potential partners for pharmacies.

What happens if I don't make the change?

Private equity investors and large not-for-profits are entering the community care space, given the compelling market dynamics of an ageing population. These competitors will see medicines care as a natural extension of their offerings. If these models take hold, community pharmacies may be confined to in-pharmacy medicines supply, which will be increasingly susceptible to online providers delivering directly to patients' homes.

You are not alone – champion story

Jason Harvey – Outback Pharmacies, Broken Hill, NSW

Jason acknowledges that in-home services are not currently a priority for many pharmacies. However he believes that this is an area that most community pharmacies need to examine as a potential source of future growth.

Partnering with the Royal Flying Doctor Service, Outback Pharmacies sends scripts to one quarter of New South Wales. Serving the needs of his rural community is important to Jason's values. He sub-contracts his pharmacists to the local Aboriginal Community Controlled Health Organisation and delivers 800 dosage packs a week to the Broken Hill aged care facility, setting pharmacy up as a central element of the local health system.

"There was a need in the community for pharmacists to take the leap to provide their expert medicines knowledge outside of pharmacy. Identifying and serving the in-home care needs of patients has improved health outcomes in Broken Hill."



Pathway change plan



Market research

In-home care had the most patient support of all the pathways. Only 4 per cent of patients were strongly opposed and most (53 per cent) say that they would probably or definitely use pharmacies for in-home services. The majority of patients believe that in-home services would provide sufficient value and would be willing to pay for them. The most popular elements of in-home services include home delivery, in-home tests and assistance with monitoring equipment and devices.

Quick wins

Undertake initial research to identify individuals or groups in the local community who would potentially be most interested in receiving, contracting or partnering with your pharmacy to provide in-home services.

What can I do now?

- Research the opportunity for in-home services that your pharmacy can provide now or consider offering in the future, including potential funding sources
- Talk to your patients and their carers about services they would like to have provided to them in their homes
- Identify existing providers in the community who would potentially be interested in partnering with your pharmacy in coordinating, delivering and promoting services
- Undertake some initial planning. Establish a budget. Talk to potential third-party funding sources and reach agreement on how you will work with them, including proposed pricing
- Talk to your team and ensure they are aware of your plans, their role and that they advise your patients
- Start with a personalised medicines reminder service, a home delivery service or in-home medication reviews
- Provide training so staff have the skills to deliver in-home services in addition to their other pharmacy roles
- Revise business operations and workflows to accommodate in-home services, including scheduling, travel arrangements and opportunities for the use of online booking, recording and fulfilment to support the services
- Explore the business case for investment in technologies such as point-of-care or patient monitoring devices, taking into consideration their suitability to be used in the home, and electronic recording and follow-up
- Begin research into longer term opportunities, including personalised in-home medication support packages

Who do I talk to?

Make contact with GuildLink about a medicine reminder service and Gold Cross about home delivery support.



Collaboration and partnerships

What is the pathway?

Collaborate and partner with the wider health sector, focused on medication support and services, including:

- Collaborating with clinicians, manufacturers and regulators to support emerging and novel drug therapies, including biologics, immunotherapies and pharmacogenomics
- Establishing relationships with Primary Health Networks (PHNs), general practitioners, specialists and allied health professionals to deliver services that meet individual and local population health needs
- Participating in research partnerships relating to medication advice, management and safety

Why make the change?

Community pharmacies can leverage their trust, skills and accessibility into emerging clinical and practice-based opportunities. This includes becoming a preferred destination for patient-centred care relating to specialised medicines, including administering, education, monitoring, safety and quality use. Pharmacy is also ideally placed to coordinate medicines related care and to be an essential gateway for clinical and practice-based research.

The opportunity for pharmacies

This opportunity includes partnerships to deliver medicines safety and compliance, and collaborating with GPs, PHNs and allied health in developing patient-centred models of primary health care.

There is an opportunity for pharmacies to take the lead in supporting the safe and effective use of novel and emerging therapies such as biologics, biosimilars and immunotherapies in collaboration with manufacturers, medicines safety platform providers, academic researchers and medical specialists. This opportunity is likely to require broad education, re-training and in some cases the accreditation of pharmacies and their skilled staff.

Separately, pharmacies can build strategic partnerships with local primary health care providers and their representatives (e.g. PHNs) that focus on shared care models, including the provision of medication support.

What happens if I don't make the change?

PBS growth will be in specialised medicines, many of which require increased clinician support. If community pharmacies do not have this expertise they will be bypassed and left with low margin, low value-adding medicines.

Partnerships and integration of patient care will be the hallmarks of the future health system at both the macro and local delivery level, and if community pharmacies are not active participants they risk being marginalised.

You are not alone – champion story

Luke van der Rijt – Southcity Pharmacy, Wagga Wagga, NSW

Luke believes that unless pharmacies move out and seek partnerships and collaboration, they will miss out on some great opportunities for their businesses and for their patients.

Luke's pharmacy is a great example of engagement with the broader health care system and community. Working with primary and allied health professionals, Luke has upskilled both his pharmacists and the broader health care network in the Riverina. The Murrumbidgee Primary Health Network (PHN) has provided pharmacies in the area with 91 mental health accreditations, five diabetes education scholarships and 24 grants for cancer screening.

“Collaborating with providers and stakeholders gives pharmacy more respect as a health care destination, encourages dialogue and opens eyes to the potential for pharmacy to assist in improving patient outcomes and quality of life.”



Pathway change plan



Market research

Patients support greater collaboration with the broader health sector, including increased communication between doctors and pharmacists; having allied health professionals located on-site in the pharmacy; being able to access Medicare in a pharmacy; and closer integration with health providers for medicines safety and the development of health records.

Quick wins

Engage with your local PHN to consider ways that community pharmacy can partner with other health providers in meeting the needs of the local population.

Focus your continuing education and that of your staff on emerging drug therapies.

What can I do now?

- Understand the local health priorities in your area and engage with your Primary Health Network (PHN)
- Strengthen and broaden your relationships with other local health providers, patient and community groups
- Keep an eye out for local tendering opportunities, including from PHNs
- Consider participating in collaborative health service delivery trials with other health providers in your community
- Undertake some initial planning. Establish a budget and develop a collaboration plan
- Integrate into your pharmacy practice, with staff training, referral pathways and services recording platforms
- Develop a communications plan, informing patients and other local providers. Set up an evaluation
- Educate yourself and your staff in the clinician support requirements for new and emerging drug therapies
- Understand which new drug therapies are most relevant to your patients and the local population
- Look for opportunities to participate in new-to-therapy medicines adherence and safety programs
- Consider any opportunities to participate in pharmacy practice-based clinical research

Who do I talk to?

Talk to your local PHN either individually or with other interested community pharmacy owners. Alert relevant medicine manufacturers of your interest in new-to-therapy programs and talk to GuildLink about existing programs.



Automation

What is the pathway?

Introduce automation to reduce manual processes and focus staff on patient care activities, including:

- Automated dispensing and medicines packing systems
- Other solutions that reduce the time and cost of administrative tasks and improve service levels (e.g. stock ordering and pricing, bookings and payments, payroll, self-service purchasing pods)
- Remote health monitoring, and health advice and reminders using smart phone apps

Why make the change?

Automation can deliver efficiencies in administrative processes, including medicines picking and packing, point of sale, marketing, patient monitoring and advice, back office activities such as supply chain and inventory management, and human resource management. This frees up staff time which can be used to deliver services and improve customer care, generating new revenue streams and improving personal relationships with patients.

The opportunity for pharmacies

Early adoption of the right technologies can improve profitability. Options range from large investments such as automated dispensing machines which may only be viable in larger pharmacies to relatively low cost solutions, including platforms that automate supply chain decisions, patient communications and back office activities.

Substantial financial investment may be required. However, these technologies are already present in some pharmacies, so information is available on their impact. An additional benefit is that many of these solutions enable measurement of business performance. With funders focused on cost effectiveness, automation can deliver a competitive advantage over less technologically advanced health providers. It can also demonstrate your personalised approach to patient care, including through virtual monitoring and online patient advice.

What happens if I don't make the change?

Automation in the broader services sector is accelerating regardless of the progress in any particular segment of the health system. If pharmacies do not extract efficiencies from automating administrative tasks, they are more susceptible to labour and other cost increases and at a competitive disadvantage to businesses that have already embedded these solutions. They are also less able to demonstrate value to patients, partners and funders.

You are not alone – champion story

John Kardis – Advantage Pharmacy, Melbourne, VIC

John thinks that one of the biggest challenges in running a successful and efficient pharmacy business lies in the way inventory is managed. The Advantage Pharmacy group has centralised and automated their ordering through a single platform. Thirty-three stores run on the platform, which automatically suggests purchases of prescription and over-the-counter medicines and retail items as needed, keeping the inventory streamlined and manageable. John constantly evaluates processes and tasks for potential automation opportunities. Stock is managed on demand rather than filling shelves and hoping it is sold. John does not drown the store in stock.

"Automation can save the pharmacy a substantial amount of time – administrative tasks such as purchasing, invoicing and inventory management are no longer consuming valuable time that staff can use to focus on better patient outcomes."



Pathway change plan



Market research

Whilst not as widely supported as other pathways, a majority of patients support automation in pharmacies. A significant portion of patients (33 per cent) were strongly opposed to charging for automation. The solutions that are most attractive to patients are automatic notifications about the availability of a script for collection, followed by health monitoring and advice via smartphone apps.

Quick wins

Calculate the time spent doing repetitive tasks that are not patient focused and look at examples of pharmacies that have used automation to reduce this burden.

What can I do now?

- Calculate the time spent by staff doing repetitive tasks and seek their input into possible efficiencies
- Talk to other pharmacy owners who have automated various administrative processes
- Undertake some initial planning. Establish a budget. Talk to your team and ensure they are aware of your plans to use automation to enhance the overall efficiency of your pharmacy and are trained in the new systems
- Consider the benefits of investing in automated dispensing and/or medicines packing
- Undertake due diligence on software to optimise stock management including ordering, stock turns and pricing
- Investigate in-store self-service pods. Consider using tablets to have patient information at your finger tips
- Assess software solutions that analyse de-identified patient data to identify services opportunities
- Consider software and applications to automate communication to loyalty program members
- Consider automated repeat reminders and script pick-up notifications
- Consider opportunities to automate payroll and human resource systems
- Re-allocate administrative resources freed up by automation to patient care activities

Who do I talk to?

Talk to your staff about undertaking an audit of the most repetitive administrative tasks in your pharmacy and how they think automation could be used to create efficiencies and improve patient care.



Leverage brand

What is the pathway?

Align your pharmacy brand with your patient offering and leverage your competitive advantages, including:

- Understanding the competitive advantages that stand your community pharmacy apart
- Branding and promoting the patient services offered by your community pharmacy
- Leveraging own-brand, banner group or Gold Cross over-the-counter medicines and front-of-shop products

Why make the change?

Community pharmacy is highly trusted by patients and consumers, so identifying products and services that can leverage the competitive advantages of this trusted 'brand' makes strategic sense. In isolation, this pathway may not have a transformational impact on community pharmacy. It can, however, be pursued in tandem with other pathways, such as the establishment of health hubs, the provision of health services and reviewing retail products.

The opportunity for pharmacies

The first step is to understand the competitive advantages that stand your pharmacy apart and develop a brand that leverages your strengths.

Creating own-brand products or expanding the use of the trusted Gold Cross brand may not generate additional revenue but will contribute to a 'brand presence' and help maintain margins. Own-brand products can be sourced cost-effectively from white label manufacturers with investment in marketing to promote customer awareness. Key risks include narrow profit margins with care required in determining which segments have most potential.

Market research shows that consumers see value in pharmacy services but have little overall awareness of them. This provides an opportunity for pharmacies to brand and market their patient services as a key differentiator.

What happens if I don't make the change?

If community pharmacy does not entrench and effectively promote its trusted caring brand, others will fill the void, including existing competitors and prospective new entrants such as online retailers which may leverage the Amazon platform.

A deterioration in the overall strength of the community pharmacy 'brand', will make it more difficult to successfully introduce and promote new pharmacy products and services.

You are not alone – champion story

Catherine Bronger – Chemistworks, Wetherill Park, NSW

The Gold Cross forms a core part of the independent Chemistworks brand. Marketing on radio, social media and online is budgeted for and utilised effectively to ensure that the community is aware of the professional services such as vaccinations and pain management that are provided in the pharmacy.

Catherine's group also makes sure to leverage the differentiators of some of its pharmacies, for example Wetherill Park is open 24-hours day, 365 days a year, so they make sure to highlight that in their marketing and branding.

"On average, pharmacies are two and a half kilometres apart. To differentiate themselves in the community, a standard of excellence and care must always be at the forefront of any branding and marketing."



Pathway change plan



Market research

Public perception of community pharmacy, measured on a scale from 0 to 10 where 10 is highly positive, stands at 7.2 overall and does not materially vary between those who use discount pharmacies (7.2), large banners (7.3), medium banners (7.3), and local independent pharmacies (7.3). This indicates that patients do not greatly differentiate between 'brands' of community pharmacy based on size. Individual community pharmacies can succeed based on both the high level of patient satisfaction for the entire network, and by further differentiating their unique offerings.

Quick wins

Request feedback from your staff and patients on the perceived brand of your pharmacy, focusing on why they prefer your pharmacy to others and what you do that is most valued.

What can I do now?

- Talk to patients and staff about how they perceive your pharmacy. What do they like most? What can be improved? What would they like to see in the future? This will help you understand your brand
- Review your pharmacy branding and whether it is clear and aligned with the inherent value of your offering
- Undertake some initial planning. Establish a budget. Talk to your staff about how you intend to leverage your pharmacy brand
- Review your product lines and presentation. How clear is the signage? Do your products align with your brand
- Evaluate how best to promote own-brand products, including new marketing channels (for example social media)
- Ensure that a list of the services your pharmacy provides is clearly visible and is included in your marketing materials as well as on [findapharmacy.com.au](https://www.findapharmacy.com.au)
- Carry out promotions in your local community and on social media highlighting your unique products or services
- Train your staff in understanding your products and services and why they matter to your patients
- Identify opportunities for co-branding or co-marketing your products and health services

Who do I talk to?

Talk to your staff and patients about what sets your pharmacy apart from its competitors. Review the market research from Framework for Change which identifies the current and future priorities for patients.



Review products

What is the pathway?

Review the pharmacy's health related product range to leverage the physical distribution network and enable the other growth pathways, including:

- Broadening the retail range to include new products from best-selling categories
- Introducing health products not currently widely available in pharmacies, which have the greatest relevance, profit margins and growth prospects
- Aligning the product offering with the services focus

Why make the change?

Retail competition will continue to increase, particularly from online sources (including Amazon), traditional grocery retailers and large pharmacy discounters. Community pharmacies need to continually update and adapt their product range to maintain customer appeal and make best use of their retail footprint. They also need to be able to respond quickly to major changes in product and retailing trends, both in Australia and internationally.

The opportunity for pharmacies

The right products and product mix can generate material increases in profits, deliver additional foot traffic and build customer loyalty. This may include well-established pharmacy segments such as baby-care, skin care and pain, as well as products in the wellness and wellbeing categories. There are also opportunities for pharmacies to specialise in health products that align with their services offerings. Finally, Australia's international reputation for quality in health care products provides the potential to retail to offshore customers.

Care is required in product selection and stocking decisions in order to maximise effective sales per square metre of shelf space and avoid the need for heavy discounting to move old stock. Product selection should also align with the brand of the pharmacy, including its areas of health focus and its broader health partnerships.

What happens if I don't make the change?

Community pharmacies are operating in a highly competitive, cut-throat retailing environment. Physical retailers will need to secure a greater share of a declining in-store market, as consumers move online and products are more accessible than ever before. If pharmacies do not respond by aligning their products with their brand, their services offerings and local customer needs, they risk not being able to sustain a high foot-traffic retail footprint.

You are not alone – champion story

Amanda Bryce – Gerald Burns Pharmacy, Bicton, WA

Amanda knew that her pharmacy had to provide a point of difference for the community, as Gerald Burns Pharmacy is located in a shopping centre across from a supermarket. Products in community pharmacy have to assist patient health outcomes, and Amanda recognised that reactive single solution based health care was not achieving those outcomes for her patients. Holistic health solutions enhanced by supplements, vitamins and locally produced products such as fermented drinks for gut health have allowed Amanda to build a unique and innovative pharmacy. Transforming the selection of products to match the health services and patient outcome focus of Gerald Burns was Amanda's top priority when reviewing her products.

"I'm open to any product if it has a health benefit. We as a team need to believe in the product. If it's a fad, it's not going to cut it. We need to believe in its health value, be passionate about it, and be willing to promote its health benefits to our patients and health care partners."



Pathway change plan



Market research

Patients express little interest in expanding pharmacies' focus on non-health related retail products. Patient focus groups indicated a preference for smaller, more personalised and health focused pharmacies over supermarket style pharmacies. Large, diverse product ranges do not figure into most patients' vision of the pharmacy of the future; rather they emphasise the importance of medicines, health advice and health services.

Quick wins

Determine the most and least profitable products in your pharmacy through analysis of sales, margins and stock turns.

What can I do now?

- Determine your most and least profitable products through analysis of sales, margins and stock turns
- Access up-to-date research on consumer product preferences, retailing category trends and segmentation
- Access research or undertake your own due diligence into online purchasing trends relevant to pharmacy
- Undertake some initial planning. Establish a budget. Talk to your patients and staff about which of your existing products are most valued and where there may be an opportunity to introduce new products
- Consider modifications to your product range based on margins and turnover and the benefits of aligning your products with the services provided by your pharmacy and local allied health professionals
- Identify categories and segments where range can be expanded or contracted, as well as innovative new products that may be appropriate to trial
- Adapt shelf space allocation and floor layout to accommodate proposed changes to your product range and focus
- Train staff on selling products and the strategies required for higher price items
- Understand how your products interrelate and range in ways that enable you to deliver holistic health solutions
- Use data to review and change your products dynamically if positive or negative impacts are observed

Who do I talk to?

Consider talking to a retailing expert who may be able to work with you in reviewing your current approach and devising a strategy that is aligned with your pharmacy's broader business strategy.

Next steps

The Guild is here to help

We will see significant changes to community pharmacy and the wider health system into the future. Framework for Change is a journey for pharmacies and the Guild alike. It informs how the Guild will support its members, including advocacy, business support and partnership building.

The Guild's response to the Framework for Change strategic planning project will be developed over time, working closely with pharmacy champions, wider industry innovators and other partners who will help refine and enable the successful implementation of the growth pathways. The Guild will develop resources to support the Framework for Change journey, which will be progressively released after further consultation with members and the broader pharmacy sector.

Along with the results of the concurrent member engagement work that is being undertaken by the Guild Branches, the Framework for Change growth pathways will be a key determinant of the Guild's future member offerings.



KEY

Current role

Potential role



The Framework for Change project has involved extensive stakeholder feedback – thank you

To ensure that Framework for Change reflects the opinions of industry, peak bodies, non-government organisations, educators and researchers, technology providers and pharmacy groups, dozens of organisations have been consulted. This has resulted in a wide range of views being shared and incorporated into the Framework for Change.

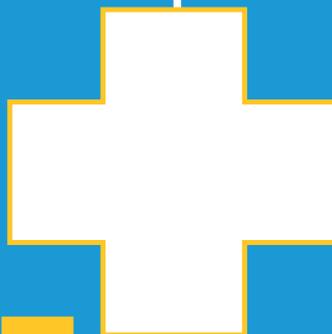
Thank you to all the organisations that have helped in crafting a sustainable, longer term path forward for the vital community pharmacy network in Australia. Thank you also to Pottinger, ORIMA Research, our pharmacy champions and subject matter experts for your contribution to this important project.

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|--|--|------------------------------------|
| Advantage Pharmacy | EBOS Group/Symbion | Pharmacy Board of Australia |
| Amgen Australia | Federation of Ethnic Communities' Councils of Australia | Pharmacy Guild ACT Branch |
| Asthma Australia | FRED IT | Pharmacy Guild NSW Branch |
| Australian Association of Consultant Pharmacy | Gold Cross Products and Services | Pharmacy Guild NT Branch |
| Australian College of Pharmacy | Guild Group | Pharmacy Guild QLD Branch |
| Australian Diabetes Educators Association | GuildLink | Pharmacy Guild SA Branch |
| Australian Friendly Societies Pharmacy Association | Instigo | Pharmacy Guild TAS Branch |
| Australian Government – Department of Health | Kapadia Amcal | Pharmacy Guild VIC Branch |
| Australian Health Practitioner Regulation Agency | Medicines Australia | Pharmacy Guild WA Branch |
| Australian Healthcare and Hospitals Association | Monash University | Pharmacyworld |
| Australian Pharmaceutical Industries | National Aboriginal Community Controlled Health Organisation | Professional Pharmacists Australia |
| Australian Pharmacy Council | National Australia Bank | Retail Doctor Group |
| Australian Primary Health Care Nurses Association | National Australia Pharmacy Students' Association | Sigma Healthcare |
| Bowen Group | National Pharmaceutical Services Association | Small Pharmacy Group |
| Capital Chemist | National Pharmacies | Storbie |
| Clifford Hallam Healthcare | Optometry Australia | Stroke Foundation |
| Chemist Outlet | Palliative Care Australia | Telstra Health |
| Curtin University | Pharmaceutical Defence Limited | TerryWhite Chemmart |
| Dietitians Association of Australia | Pharmaceutical Society of Australia | University of Queensland |
| | Pharmacy 777 | University of South Australia |
| | | University of Sydney |
| | | Westpac Banking Corporation |

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Scripts in



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