



# 3 Steps to Level-Up Your Annual PBM Plan Reviews

A comprehensive plan review takes time to create. Follow this three-step guide to help ensure a successful client meeting that sets the tone for an even more successful year.

## 1 Craft a Narrative Backed by Data

### Highlight Success

Take credit for what you're doing to help your client achieve their goals – optimizing plan design, controlling drug costs, and improving the member experience.

“Member satisfaction with their benefit increased by 10%.”

“New cost management programs saved your plan \$40K.”

“8% reduction in calls to customer service; 15% increase in use of digital tools.”

### Break Down Trend Numbers

Show your client exactly what is driving their trend.



When you use an advanced automation tool, like Xevant's [TrendLogic](#), you can quickly pinpoint the source of cost increases and tailor plan recommendations to achieve better performance in less time.

### Offer Recommendations Based on Actionable Insights

Always have at least 1-2 recommendations to share with your client.

For example, the data shows an increase in GLP-1 utilization plus 3 percent price inflation. The client is also debating whether to extend coverage of GLP-1s for obesity.

#### Recommendations could include:

- Formulary change to prefer lower-cost GLP-1 product
- Utilization management criteria for weight loss use/approval
- Care management programs to support lifestyle changes

#### EXAMPLE

### Use Hard Numbers to Encourage Your Client to Act

Provide context for every recommendation. Show what maintaining the status quo might cost. Then paint the picture of what COULD be.



For illustrative purposes only. Projected savings based on a 40 percent PA approval rate.

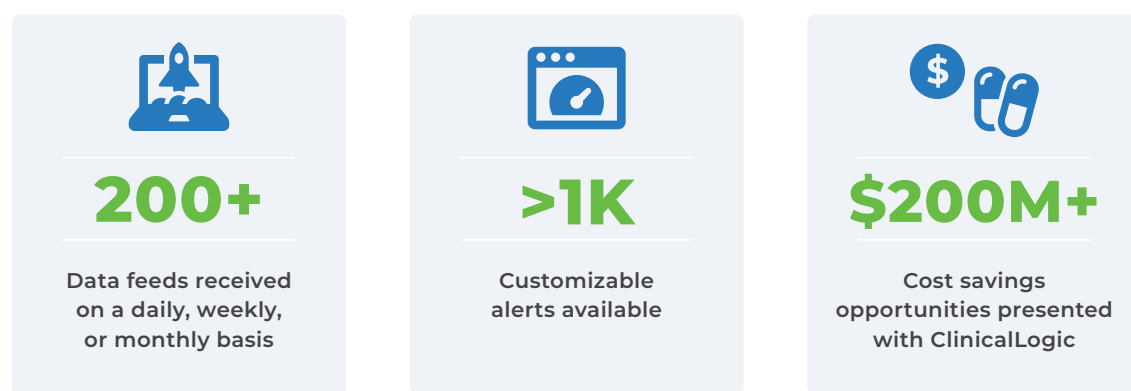
### Create a Polished Report In Minutes

Cut down on the time it takes to create reports with our [Plan Review](#) tool.



## 2 Proactively Uncover Opportunities to Optimize Benefits

Start sharing more timely, actionable information with your clients using [real-time alerts](#).



## 3 Remember the (Not So) Little Things

### Don't forget the necessary prep work and post-meeting follow-up.

- Confirm the agenda ahead of time and verify all attendees.
- Carefully review your slides and fix any typos, incorrect data, or formatting issues.
- Do a dry run.
- Add value to the discussion by providing insight beyond the words on the slide.
- Let the client know when they can expect an update from you after the meeting and follow through.

### At the end of the day...



The annual plan review is your opportunity to show the value your organization brings to the partnership.

With Xevant's industry-leading automated reporting tools, it's easier than ever to level up your annual plan review meetings and show clients that you are best positioned to help them achieve their goals in an always-evolving market.

Are you ready to level up your annual plan reviews with Xevant?

[REQUEST A DEMO TO GET STARTED](#)