Roles of Stakeholders in the Healthcare Ecosystem: A Systemic Win3-Triangle Approach to Comparative Analysis Across Pharma and Life Sciences Segments

Insights form the KP Morgan Group Conference: Global Commercial and Sales Force Excellence Summit 2024

Mini-Whitepaper 1 of 4

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Stefan Turnwald (Facilitator and Chairman)
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I am thrilled to share insights from the **Global Commercial and Sales Force Excellence (GCSFE) Summit 2024** in Berlin, which I had the privilege of chairing. My sincere gratitude goes to Sachin Sharma and the KP Morgan Group for hosting such an impactful event. The summit brought together a diverse group of industry leaders, experts, and decision-makers from Rx and OTC pharma, MedTech, and medical nutrition, fostering a knowledge-sharing environment and cross-industry dialogue.

The two-day event highlighted the growing interest in addressing common challenges across various segments of the healthcare industry. Participants from different fields were eager to explore strategies for enhancing customer engagement and identifying solutions that could be adapted to their specific market environments. Despite the diversity among stakeholders, it became clear that a unifying framework was needed to systematically compare roles and interactions across the healthcare ecosystem. This insight led to the introduction of the **Systemic Win3 Triangle**—a model designed to provide clarity and structure to the complex relationships within the healthcare system.

The Win3 Triangle: At the Operational Core of the Healthcare System

The **Win3 Triangle** serves as a comprehensive model for understanding the interconnected roles of key stakeholders in the healthcare landscape. At its core, the framework revolves around the **product** and the three primary stakeholders, each fulfilling a distinct yet interdependent role:

- **Patients:** The ultimate recipients of healthcare interventions. Their needs, preferences, and behaviors drive demand for pharmaceutical and medical products, and their health outcomes serve as the ultimate measure of success for any healthcare solution.
- **Healthcare Professionals (HCPs):** The gatekeepers of clinical decision-making. Whether physicians, specialized medical experts, or nurses, HCPs play a pivotal role in guiding therapeutic choices and ensuring the appropriate use of medical products.

- **Pharmaceutical Representatives:** Facilitators of communication and engagement between healthcare providers and pharmaceutical companies. These representatives are crucial for informing and educating HCPs about new therapies and product features, acting as a bridge between the healthcare solution organization (e.g., pharmaceutical or MedTech company) and the clinical community.

The Systemic Win3 Triangle:
A Unified Model for the Healthcare System

While recent publications outline stakeholder types and their common roles within the healthcare ecosystem, e.g., Jennifer Petkovic et al. (2023), there remains a need for a simple, practical framework that effectively maps the unique dynamics of different sectors in pharma and life sciences.
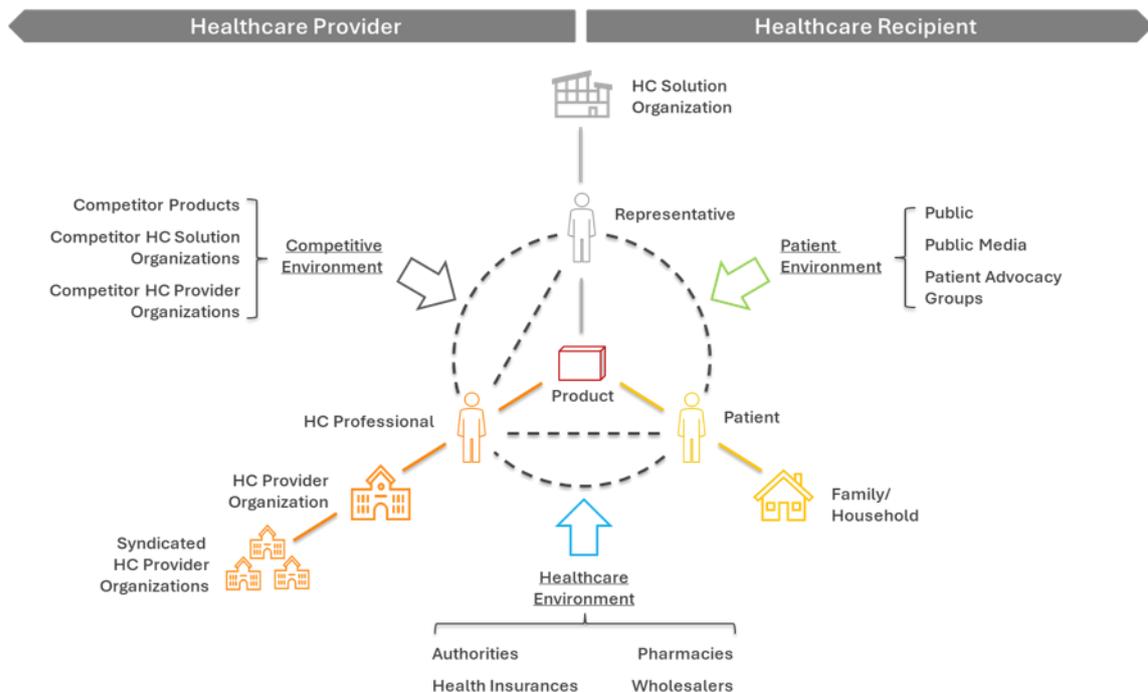

Figure 1: The Systemic Win3 Triangle: Framework for mapping stakeholder interdependence in the wider healthcare ecosystem.

The **Systemic Win3 Triangle places the product at the center of this triad**, emphasizing the pivotal role of the offering in aligning the interests of all three stakeholders. Surrounding this core are three broader environmental contexts that influence stakeholder behaviors and decision-making processes:

- **Healthcare Environment:** Encompasses health authorities, insurance providers, wholesalers, and pharmacies. This layer establishes the regulatory and financial framework within which healthcare solutions are delivered, dictating access and reimbursement conditions.
- **Patient Environment:** Includes public media, social dynamics, and patient advocacy groups (PAGs). This context shapes patient perceptions and decisions, reflecting the social and informational influences on health behaviors.

- **Competitive Environment:** Represents external forces from competing products and healthcare organizations. Competition shapes market dynamics, influencing strategies and choices made by healthcare solution organizations, HCPs, and patients.

By analyzing the healthcare system through the **Systemic Win3 Triangle**, this framework helps unravel the complex interactions among stakeholders, offering a structured approach to mapping roles across various industry settings.

Comparative Analysis of Stakeholder Roles Across Industry Segments

The summit workshop featured an in-depth analysis of stakeholder roles across different segments of the life sciences industry, highlighting how these roles vary depending on the market context. In the self-pay OTC (over-the-counter) pharma segment, for example, the patient assumes a central role as both the decision-maker and payer, given the self-medication nature of these products. Patients are empowered to choose and purchase treatments without needing a prescription, making them both the primary consumer and the ultimate beneficiary of the product.
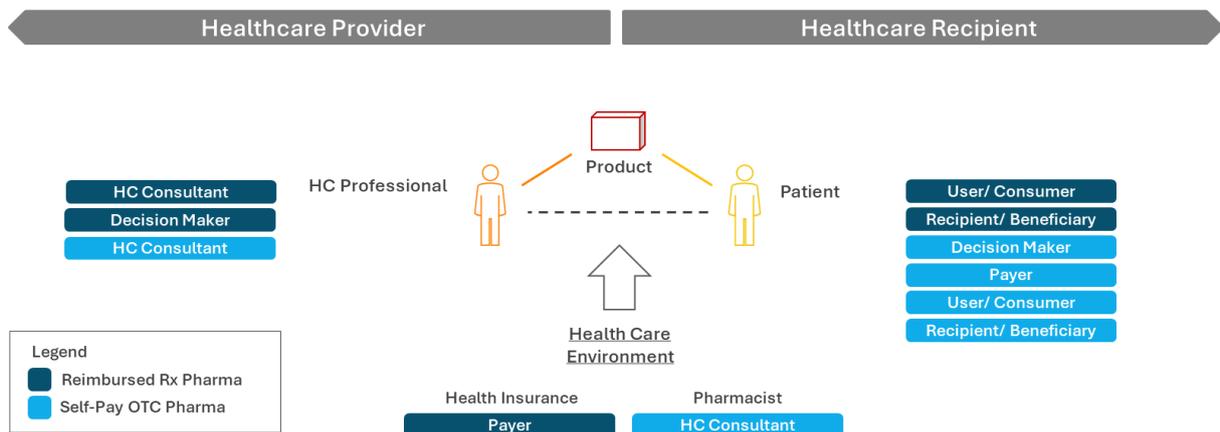

Figure 2: Roles in the Win3 Triangle: Comparing self-pay OTC with reimbursed Rx Pharma.

In contrast, the dynamics shift significantly in the **reimbursed Rx (prescription) pharma segment**. Here, the healthcare professional assumes a dominant role as both the decision-maker and consultant, guiding the patient's therapeutic journey. The decision-making process is more complex and often involves negotiations with health insurance providers, who serve as the payer. Patients, while still the consumers and beneficiaries, play a more passive role, as their access to specific therapies is determined by the decisions of HCPs and the reimbursement policies set by health insurers.

The MedTech industry introduces additional layers of complexity due to the wide range of products, from consumer devices to investment goods. For **consumer devices**, patients often take on roles like those in OTC pharma, acting as both decision-makers and payers. However, when it comes to **investment goods**—such as surgical equipment—the healthcare professional not only influences the purchasing decision but also acts as the primary user. In these cases, health insurance companies play a critical role in funding healthcare services, while patients remain the beneficiaries, whose health outcomes depend on the proper use of these tools.
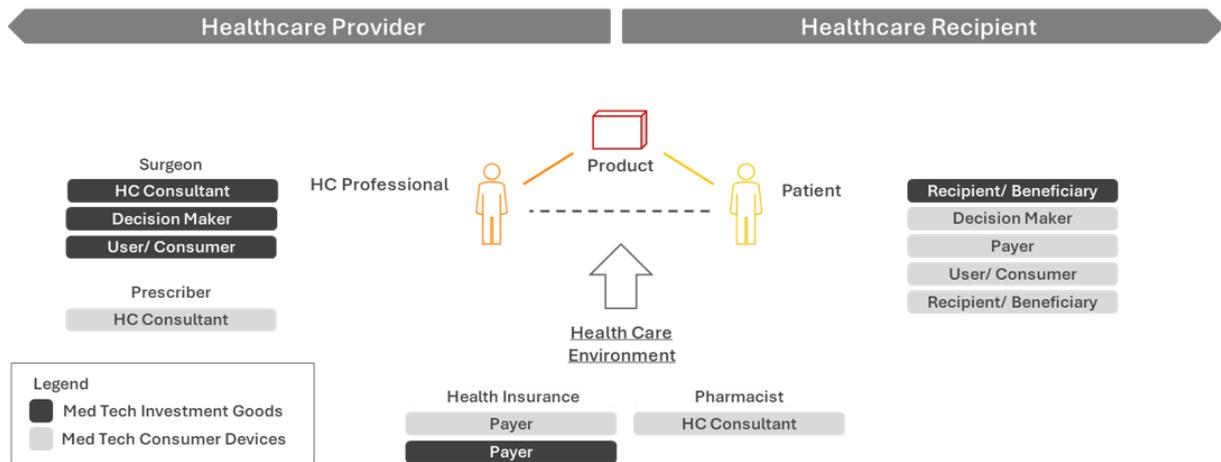
Figure 3: Roles in the Win3 Triangle: Comparing the MedTech investment goods sector with MedTech patient devices.

Systemic Dynamics and Emerging Trends

Through this mapping exercise, several critical insights emerged regarding the systemic dynamics of the healthcare environment. One key observation was the growing influence of **super accounts**, including large healthcare provider organizations and syndicated buyer groups. These entities consolidate purchasing power and decision-making authority. Often, while streamlining procurement processes, it also increases the complexity of stakeholder engagement for pharmaceutical and MedTech companies. This observation aligns with Christel Thunell (2023), who describes this trend in the European healthcare environment. The consequences of the German healthcare reform spurring further consolidation of private healthcare centers are addressed by Francesca Massarotti et al. (2025).

Another significant trend identified was the rising prominence of **Patient Advocacy Groups (PAGs)**. PAGs have become key players in shaping patient perspectives and advocating for treatments. Their involvement often amplifies the voice of patients in the healthcare decision-making process, creating a stronger B2B2C link between pharmaceutical companies and the patient community via healthcare professionals. A good description of the role of patient advocacy groups can be found in Natalia Denisova (2024).
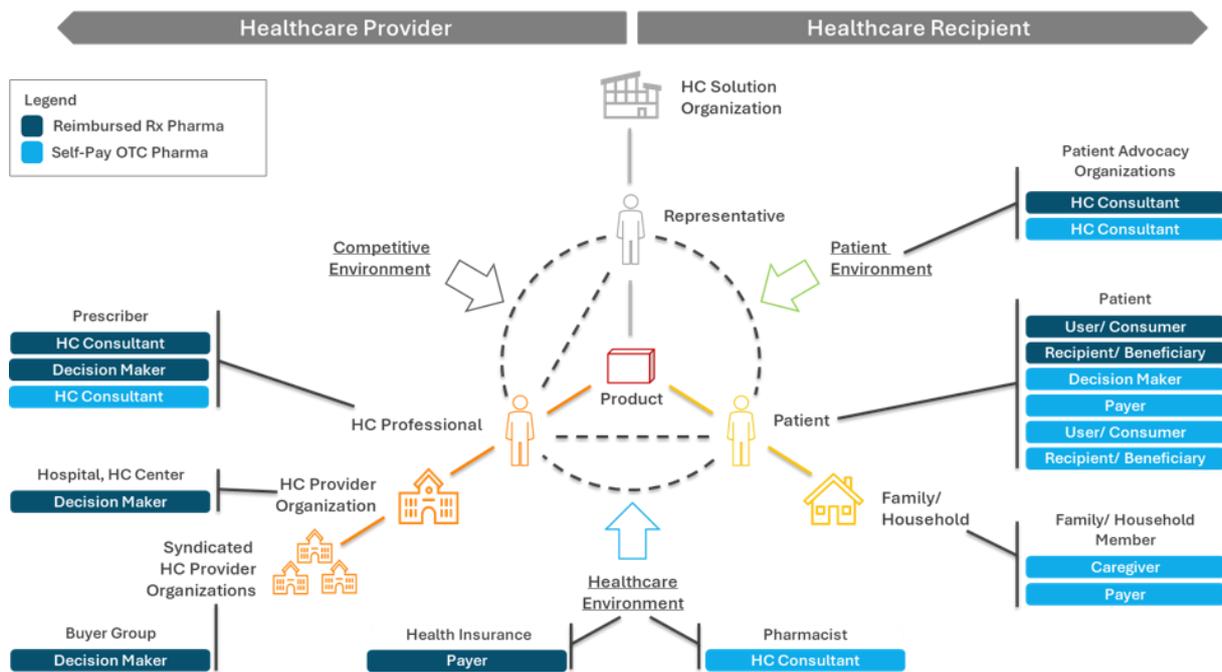
Figure 4: Roles in the Systemic Win3 Triangle: Mapping self-pay OTC vs. reimbursed Rx Pharma. HC consultancy shifted to patient advocacy groups and the impact of syndicated HC provider organizations and buyer groups on decision-making are observable trends.

Role Distribution Across Market Contexts in Pharma

In the context of self-pay OTC pharma, the healthcare recipient side dominates the decision-making process. The patient, often supported by family members or influenced by PAGs, takes on multiple roles as decision-maker, payer, and user. The healthcare professional's role is typically limited to offering consultation when requested, making the patient the primary agent in their healthcare journey.

In reimbursed Rx pharma, the roles shift towards the healthcare provider side. Here, the healthcare professional becomes the main decision-maker and consultant, directing the patient's treatment path. Health insurance providers assume the payer role, determining the scope of reimbursement, while the patient remains the consumer and beneficiary of the prescribed therapies.

Role in the HC Ecosystem	HC Ecosystem	
	HC Provider Side	**HC Recipient Side**
Healthcare Consultant	*Healthcare Professional*	**Pharmacist, Caregiver, PAGs**
Decision Maker	---	**Patient,** *Caregiver*
Payer	---	**Patient,** *Caregiver*
User/ Consumer	---	**Patient**
Recipient/ Beneficiary	---	**Patient,** *Caregiver*

Table 1: Self-Pay OTC Pharma: The focus lies on the healthcare recipient side of the Systemic Win3 Triangle.

Role in the HC Ecosystem	HC Ecosystem	
	HC Provider Side	HC Recipient Side
Healthcare Consultant	**Healthcare Professional**	*Caregiver, PAGs*
Decision Maker	**Healthcare Professional**	*Patient, Caregiver*
Payer	**Health Insurance**	---
User/ Consumer	---	**Patient**
Recipient/ Beneficiary	---	**Patient**

Table 2: Reimbursed Rx Pharma: The weight shifts more towards the healthcare provider side of the ecosystem.

Conclusion: Laying the Groundwork for Cross-Industry Learning

The introduction of the Win3 Triangle at the GCSFE Summit provided a powerful tool for analyzing and comparing stakeholder roles across the healthcare system. By emphasizing shared responsibilities and interactions rather than emphasizing differences, the model lays a solid foundation for cross-industry learning and innovation. This approach encourages a deeper understanding of systemic dynamics, offering valuable insights that can be adapted across pharma, MedTech, and broader life sciences sectors.

Outlook

In the next installment of this mini-whitepaper series, we will explore the **communication pathways to key healthcare stakeholders**, examining strategies to optimize engagement and drive meaningful interactions. Stay tuned for more insights as we continue to unpack the evolving landscape of customer engagement in the healthcare industry.

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