



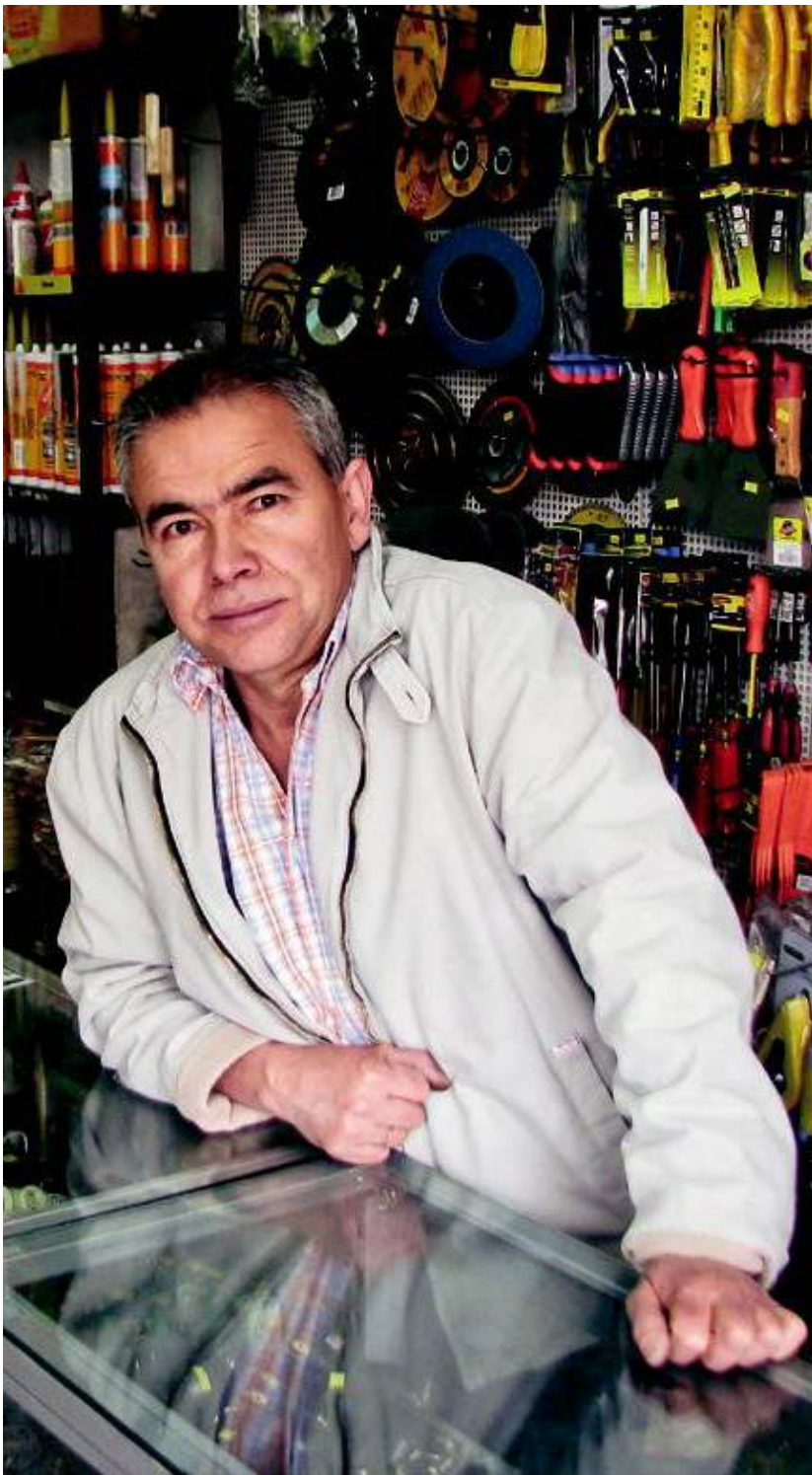
Jordi Aparici

Market Intelligence Consultant

Helping pharma companies make robust decisions based on market, competitors and patient knowledge

Market Intelligence | Strategy | Marketing | Market Research | Data Analytics | Competitive Intelligence | Forecasting | Portfolio Planning | Sales Force Excellence | Business Development & Licensing | Market Access

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RCA



Market knowledge is key from the very beginning The marketing role in the pipeline lifecycle



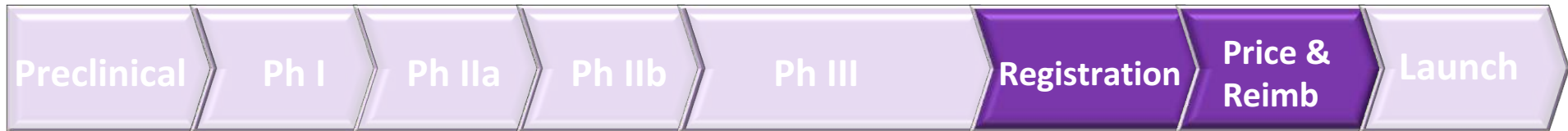
Market knowledge is key from the very beginning The marketing role in the pipeline lifecycle



- Brand Strategy Decisions:
 - Product market research (landscape, product profile test, positioning test...)
 - Target group
 - Positioning strategy
 - Communication strategy
- Sales forecasting. Business case. Quantify potential patient population
- Pricing and Reimbursement Strategy:
 - Payer research
 - Price corridors
- Market Access Strategy Development
 - Value dossier
 - HTA assessment
 - SmPC
- Geographies: Identify key global markets
- KOL network

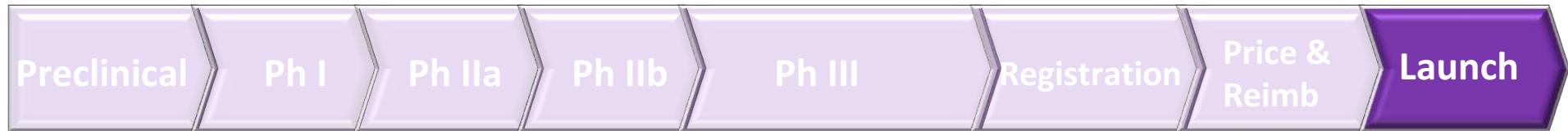


Market knowledge is key from the very beginning The marketing role in the pipeline lifecycle



- Marketing Tactics
- Identify value messages that best resonate with doctors, payers and KOLs
- Master Visual Aid
- Local adaptation
- Key target audience
- Education and disease awareness
- Pricing & R. negotiation with P&R authorities
- Country Market Access Strategy. Local Value dossier
- Sales Force Sizing and Training

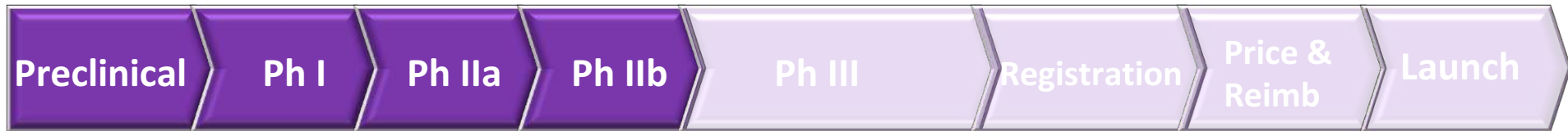
Market knowledge is key from the very beginning The marketing role in the pipeline lifecycle



- Implementación del plan táctico
- Monitorización, market research: ATU, DFU, KPIs, posicionamiento



Market knowledge is key from the very beginning The marketing role in the pipeline lifecycle



- Market Landscape assessment
- Identify treatment paradigms
- Benchmark competitive market
- Understand unmet needs
- Assess pipeline
- Stakeholders
- Quantify Market & Opportunity Potential
- TPP, dTPP definition. Value proposition. Product positioning and indication
- Assess payers' reactions to potential drug profile and trial design

R&D resources prioritization



Defining the desired product dTPP (disease target product profile)



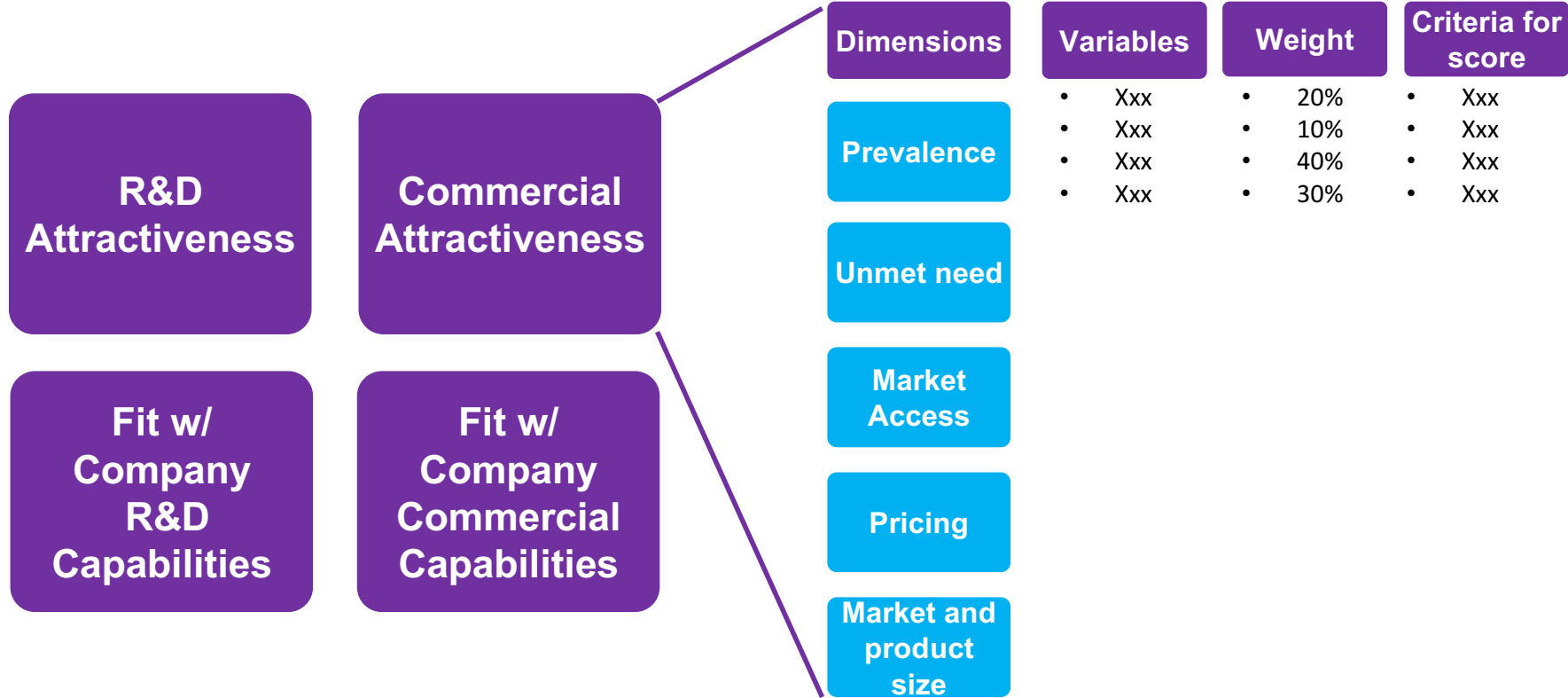
Defining the desired product dTPP (disease target product profile)

Defining the desired product TPP (target product profile)










Product ID:	XXXX
Level of innovation:	XXX

Characteristics	Minimum (MAPP)	Target (TPP)	Competitor* (CPP)
<i>Reference product</i>			
Indication (<i>primary & secondary</i>)			
Target patient population			
Dosing			
Formulation & delivery mechanism			
Efficacy (<i>Primary & secondary end points, QoL</i>)			
Safety & tolerability (<i>side effects & interactions</i>)			
Contraindications			
Price			
Opportunity window			

Projects Prioritization



Projects Prioritization

Dimensions	Proj. X36	Proj. Y21	Proj. Y52	Proj. Z18	
Commercial Attractiveness					
R&D Attractiveness					



Market Info Needed



Patient

- What are the trends in the patient population? Prevalence? Incidence?
- What is the diagnosis rate? What is the treatment rate? Do patients actively seek treatment?
- Is your product effective only in a subpopulation?
- What are the patient unmet needs?



Physician

- Is treatment driven by specialists or primary care? Subspecialties? Hospital- or office-based?
- Are guidelines in place?
- Physician unmet needs
- Is the current treatment paradigm changing?. What is doctor's perception on current products?



Product

- What are the products used today? Level of use. Place in the line of therapy
- Are there other developments in pipeline? What unmet need are they solving?
- What differentiates my product from the competition?
- What is the size of the market? And product potential?



Payer

- Who is the primary payer? Cash? Private Insurance?
- Which is the price corridor? Are there significant discounts and rebates required?
- Will price affect volume? Any patient co-pay?
- Do we foresee reimbursement/market access restrictions?



- Primary sources:
 - Internet: clinicaltrials.gov, EMA, FDA, Epidemiology data
 - Global suppliers: IMS, Datamonitor, Decision Resources, Global Data, Milenium, Pipeline Databases, etc
 - Real World Data, Big Data
 - Secondary sources
 - Market Research (quant/qual) (including Payers)
 - Competitive Intelligence
 - Congresses
 - Forecasting
- ✓ Market Understanding Research
✓ Product Profile Test
✓ Patient Unmet Needs



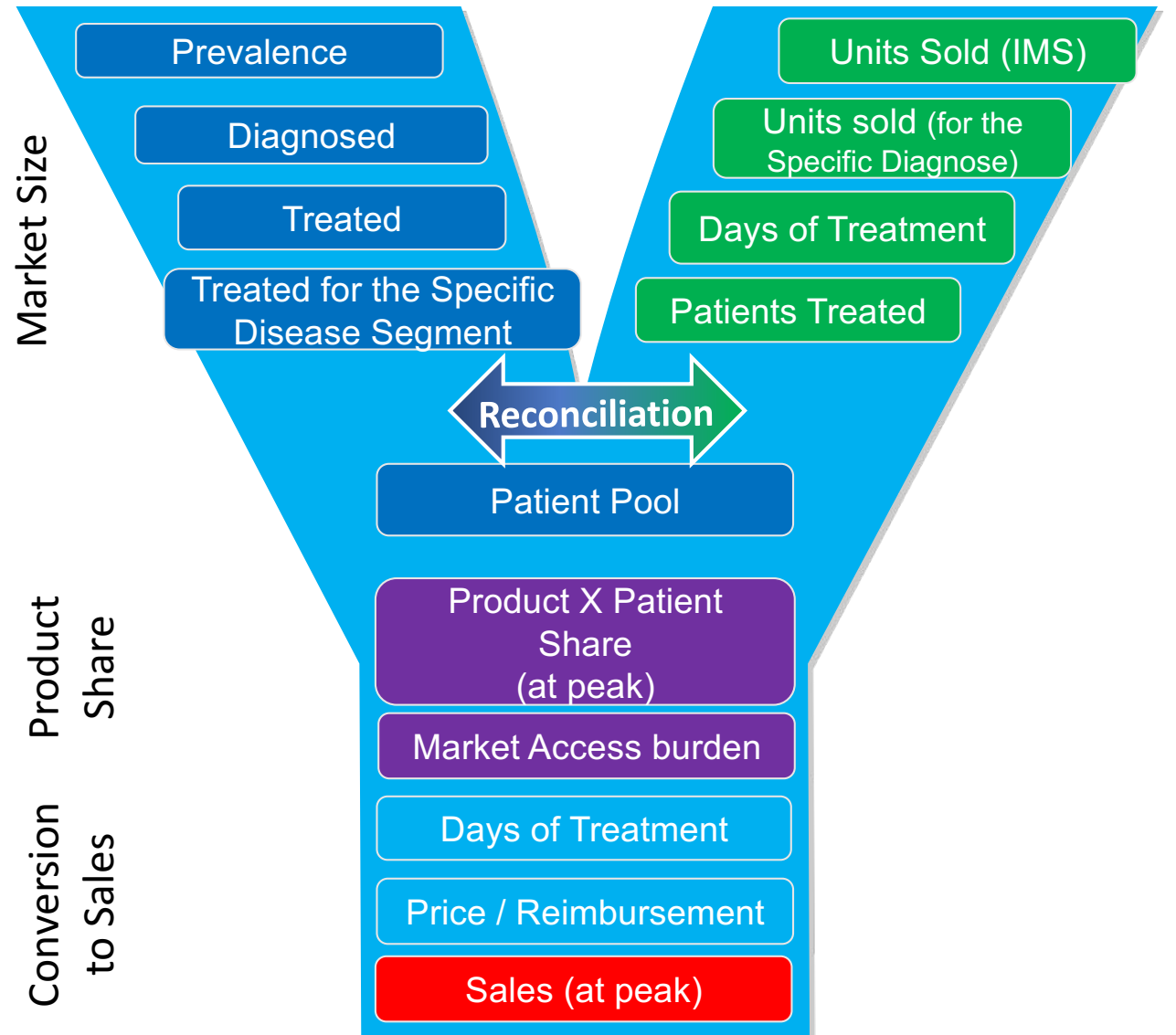
Forecasting

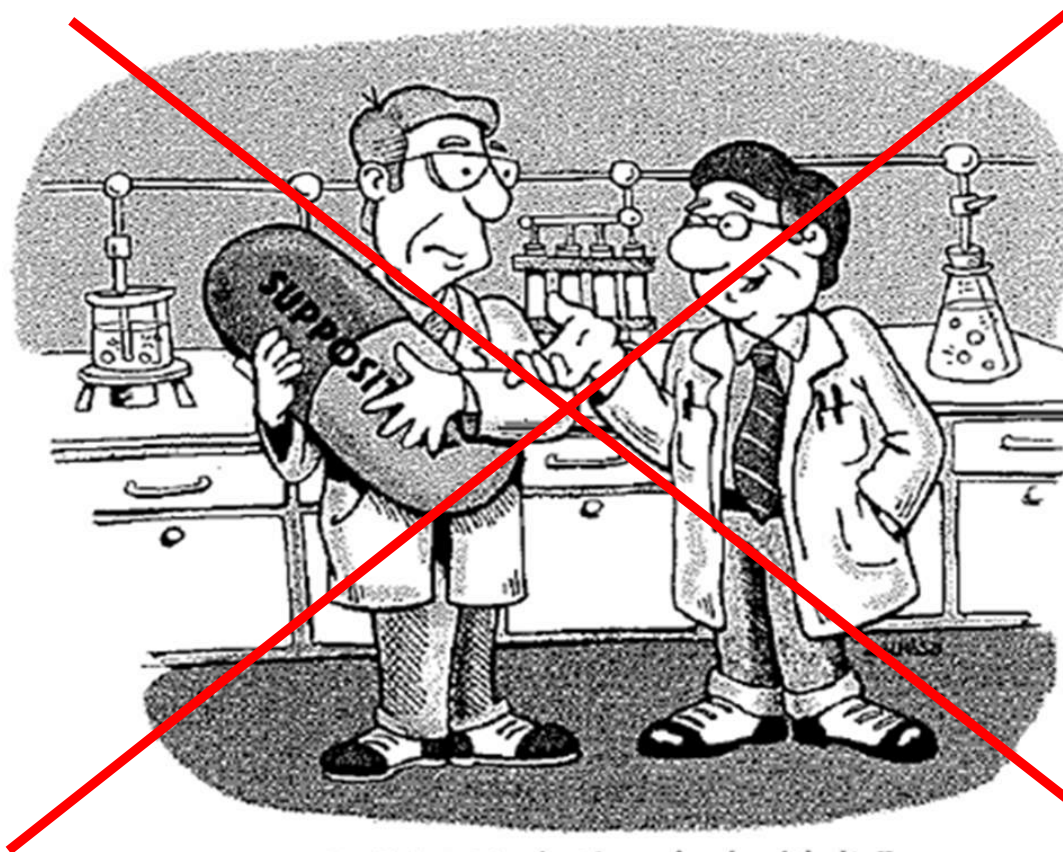
Sizing the potential of the new product



Patient-based (Bottom Up)

Sales-based (Top Down)





"We'll let Marketing deal with it."

Take home message:

Assess the market from the very beginning so that your projects are market oriented



Customer Centricity See the world as our customer does

Product Centric Company



NEW PRODUCT DEVELOPMENT
Create the best product, best technology, best design, better than competitors

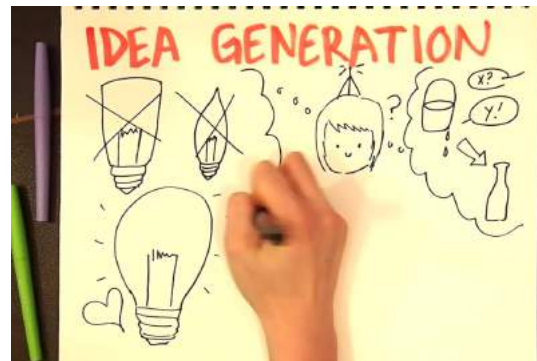
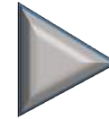
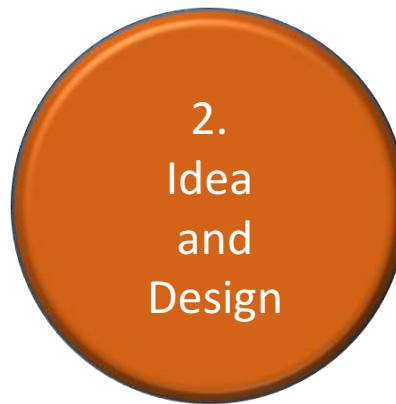
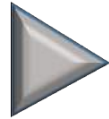
Customer Centric Company



CUSTOMER EXPERIENCE MANAGEMENT
Understand how she feels, discover unmet needs, solve customer problems and engage them

Customer Centricity

See the world as our customer does





Ethnographic Market Research



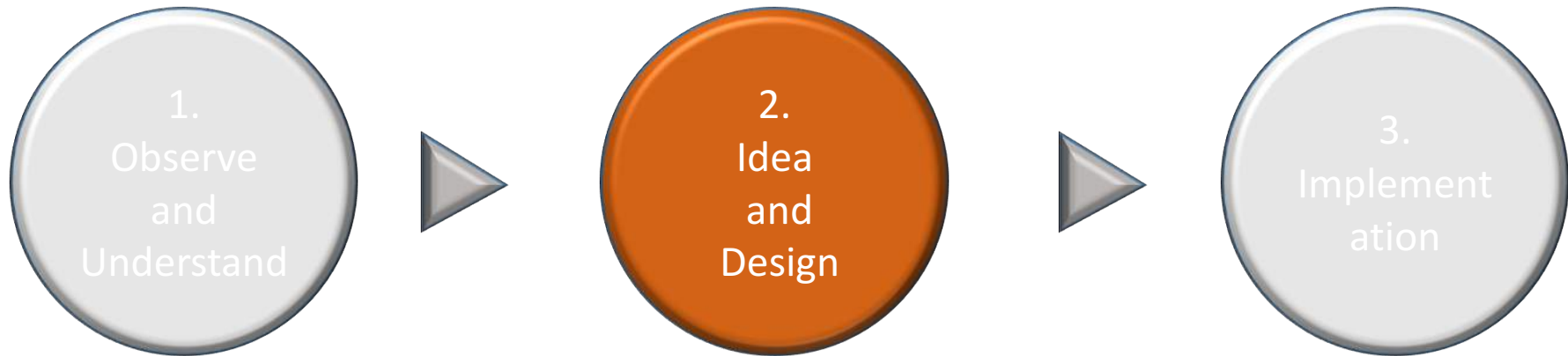


Patient Journey

Touch points identification and understanding



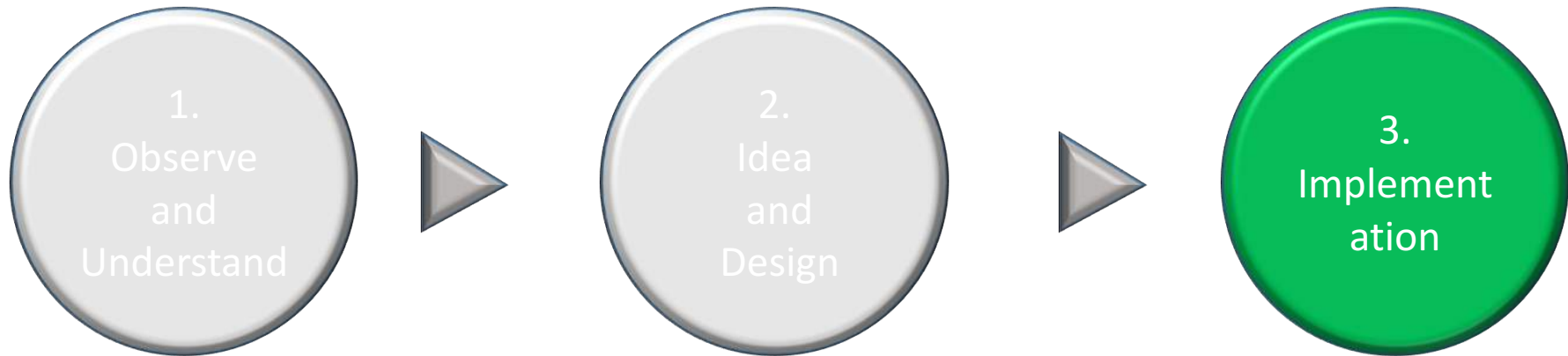
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- Identification of potential interventions
- Selection and Prioritization
- Draft design

**Co-creation
sessions**



Customer Centricity Implementation Mindset change

- Classification and prioritization of interventions
- Prepare the action plan
- Cultural transformation







- Assess the market from the very beginning so that your projects are market oriented
- See the world as your customer does
 - It will bring new product ideas
 - You will improve the interaction with customers
 - Customer engagement



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