

PLANNING FOR Launch Excellence

The pharmaceutical industry continues to witness rapid changes in the environment for new launches. To better understand what exactly drives the success of new product launches, QuintilesIMS has conducted thorough Launch Excellence research.

In the landmark series of Launch Excellence studies, QuintilesIMS analyzed data from over 10,000 launches in the top eight developed markets (US, Japan, EU5 and Canada). Leveraging the same data sets and using similar methodologies throughout the studies enables unparalleled consistency and depth of the research findings.

Three quantitative criteria were selected to identify and develop a list of launches which consistently out-performed across countries:

1. A Steep and Sustained Launch Uptake Curve:

The steepest sustained uptake curve characteristics within each country, taking its unique market access environment into account.

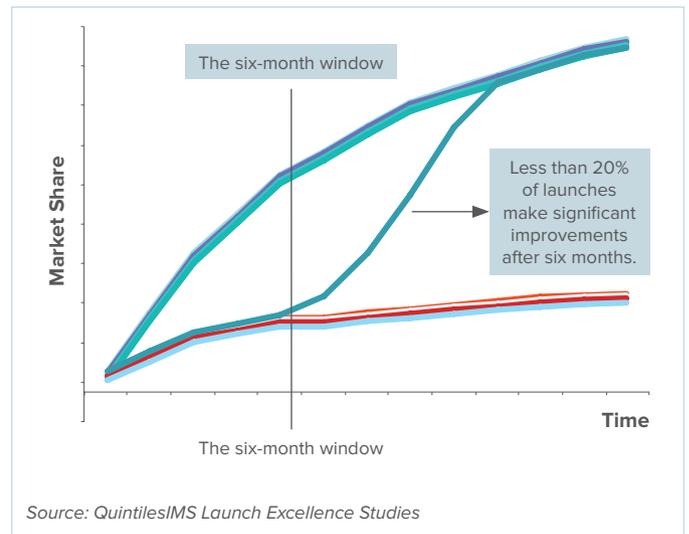
2. Promotional Out-Performance: Outstanding market share performance relative to promotional share of voice in the context of each country's specific promotional environment.

3. Market Share Achievement: Rapidly achieving high market share ranking, within therapy area and by country.

The research brings to light a number of fundamental truths about excellent launches, as well as a number of new insights.

The Six-Month Window

The research clearly shows that long-term brand performance is set within a narrow six-month window. This finding is consistent across time periods and across all markets studied.



This is the case even in Canada, which among the eight countries studied had the highest percentage of launches with significantly improved changes in trajectory between six months and two years (largely due to market access dynamics, nationally and across provinces). However, this still translates into fewer than one in four Canadian launches (23%) achieving relative improvement beyond the six-month window.

QuintilesIMS Launch Excellence Studies

Study	Launch Excellence I	Launch Excellence II	Launch Excellence III	Launch Excellence IV	Launch Excellence V
Scope & period	4,225 launches 1997-2004	3,081 launches 2000-2005	1,388 launches 2006-2009	1,309 launches 2009-2012	360 launches 2011-2015
Excellent launches*	88 (2%)	68 (2%)	19 (1%)	18 (1%)	31 (9%)
Themes	<ul style="list-style-type: none"> • Six-month window • Decline in detail impact • Market expanders 	<ul style="list-style-type: none"> • Rise of payer • 3-month dynamic window • Available market for launch declining 	<ul style="list-style-type: none"> • Pre-launch preparation: timing, organization, and quality • Alignment and incentivization 	<ul style="list-style-type: none"> • Where does "Winner Takes All" operate? • Dominance of the specialist launch • Larger number of smaller launches 	<ul style="list-style-type: none"> • Archetypes • Patient centricity • Orchestrated multi-channel model • Reset of payer partnership

* Number and percentage launches outperforming in one or more countries.



The studies also highlighted the importance of early penetration of the dynamic market (NBRx – new patient starts, switches and add-ons). Using predictive analytics it is, in fact, possible with a high level of accuracy to predict total one year market share (TRx) by projecting NBRx share from as early as week 10.

The research shows just how essential it is to prepare for and successfully navigate the high-intensity initial launch period.

The Three Foundational Success Factors

Analysis of the research, and interviews with managers of the most successful launches, also yielded three recurring themes with respect to critical success factors for an excellent launch:

- 1. An Aligned and Prepared Organization:** Described as the various functional and geographic elements of a company working together in harmony with common goals on the launch, including committed senior leadership, cross-functional teams and centrally driven processes.
- 2. A Powerful and Pertinent Value Proposition:** This increasingly means meeting disparate needs of regulatory trial requirements and payer expectations. Furthermore, physician, patient and other key stakeholder perspectives must be considered.
- 3. Effective and Efficient Stakeholder Management:** Identifying and adjusting the approach to commercialization for key stakeholder groups, ranging from earlier than ever payer engagement through to implementation of novel and effective engagement models.

Top performing companies also differentiated themselves by applying an effective mix of leading and lagging Key Performance Indicators (KPIs) in line with the aforementioned success factors. These insightful and actionable KPIs enabled companies to quickly identify issues and implement corrective action.

Implications for New Launches

Although the launch environment is becoming more complex, the three critical success factors still stand the test of time. How these are applied will depend on the therapy area and specific country dynamics.

In addition, based on our research, interviews and recent market trends, we expect that future excellent launches will require significant skills and capabilities in the following areas:

- **Exceptional Patient Insight**
In-depth understanding of the patient journey, detailed stakeholder analysis, and patient-centric programs to enhance experience and outcomes, including patient focused KPIs.
- **Orchestrated, Multi-Channel Customer Engagement**
Cost-effective and highly responsive commercial models with fully integrated service teams engaging stakeholders across channels, and effective digital outreach as a key differentiator.
- **Innovative Payer Partnerships**
Earlier than ever engagement of payers, novel funding approaches, and a Real World Evidence plan alongside the clinical development plan.

As part of our ongoing research, we will continue to explore specific elements of the foundational success factors that drive excellent launches with particular relevance for Canada.

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