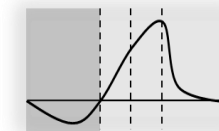


Pre-launch Market Opportunity Assessment



Multi-country market assessment to very granular patient segments paves the way for building the appropriate commercial infrastructure to launch 2 products

Challenge / Opportunity:

- US-based company is 18 months before EUR launch of two new promising antibiotics
- Client wants to establish commercial organizations in EU countries (only HQ team in place)
- Limited understanding (and data) of market potential, treatment patterns, & competitor situation at the country and patient level
- Need reliable, detailed forecasts to determine required sales and marketing resources (incl. headcount) by country

Our Approach:

- Define target patient segments with medical and marketing team using ICD-codes, proxies, and other data to quantify accurately the specific patient pools for each product
- Develop patient based model allowing roll-up and drill down to individual market (patient) segments for each country: indication, pathogen/drug resistance, treatment step, competitor share – online tool enables multi-user collaboration
- Conduct primary and secondary research to populate models with robust, validated data and provide guidance for future projections (trend and event analysis)
- Conduct country-specific workshop sessions to review forecast inputs, pressure test assumptions, run scenarios, and guide decision process for required sales & marketing investments

Results:

- Client obtained a dynamic forecasting tool, which could be used at the country level and roll-up to the EUR total in real time – enabling dozens of users to create & save scenarios based on 'global' and local inputs – achieving alignment on market opportunity, revenue trajectories and key success factors
- Decisions regarding budgeting (sales and investments) became more transparent and each team member had input to ensure consensus on the final business plan – over time actual sales could be analyzed for variances and reasons for those

