



*A Leading Full Service Dedicated Healthcare Marketing Insights  
& Intelligence Organization Covering Africa & Middle East*



# Drug Creator™

*"Determining the optimal product innovation & success"*

*"We help clients launch more successfully, make better product development, reduce risk on investment, promote more efficiently, maximize the molecule, better direct the sales force & getting the right products to the right markets"*

WE CAN HELP WITH BUILDING PRODUCT ROADMAPS

*"Successful product development combines a view of the world from a technological point of view, together with a view of what customer's will actually need or want"*

We know that pharmaceutical companies are looking for every opportunity to enhance their pipelines, prove the value of their medicines and optimize their commercial effectiveness

Drug Creator™ is a company's lifeblood growth and profits suffer without aggressive product development introducing new products and services into the market

New Product Development is typically an iterative process that comes from an in depth understanding of the market, customers and technology, spot weak ideas and kill them off early, optimize the mix at each stage of development & identify your best ideas and get them through your innovation process

*"Our goal is to help you obtain a deep insight into the drivers of uptake that will determine the future of aspiring new products, discover, compare and select the optimum product features which enhance consumer satisfaction"*

We focus on the following key areas to help you launch successfully;

## Market Assessment

- Market Size / Patient Flow/ Demographics?
- Prevalence / Grades / Symptoms & Risk?
- How is the disease diagnosed?

## Treatment Dynamics

- Market Dynamics: Circumstances of prescription: initiation, switch, add-on therapy
- Treatment maps or treatment algorithms?
- How many RTX, who prescribe? What & Why?
- What factors affecting drugs choice & why?
- Who are the competitors and what is their portfolio in this area? What are their growth dynamics?
- Current level of satisfaction & switch pattern?
- Pricing, Payment Coverage & Reimbursement?

## Concept Testing

- Understand market reaction to product X concept?
  - Uniqueness / Importance / Believability?
- Which ideas concept have the greatest chance?
- Where the strength and weakness of drug concept?
- Product development – is there a place for my product, where will it fall in the treatment algorithm?
- The most potential market segments, Which group could be targeted as a result?
- Assess physician's intention, switch & trial?

## Price Testing

- What range of prices is acceptable in the market?
- What price will maximize revenue?
- What price will maximize trial?
- What market share and revenue forecasts that are realistic and actionable?



# Brand Power Tracker™

*"You can't manage what you don't measure"*

*"With brand Power Tracker Maximize Your Image, give you a holistic understanding of your brand's Power, develop action plans to improve the health of your brand, optimize your communication strategy and follow-up on your image over the years"*

EXPLORING BRAND EQUITY MEASUREMENT

**B**rand image is the associations between a brand and image based statements (eg "Is a brand for older people")

## "Strong Brands Have Clear Patterns Of Association"

The following five attributes that drive customers to insist upon specific brands:

- 1- Awareness
- 2- Relevant differentiation
- 3- Value
- 4- Accessibility
- 5- Emotional connection



*"These brand insistence drivers work together to move customers from being aware of your brand and preferring your brand to purchasing your brand and being loyal to your brand"*

Brand Power Tracker™ our approach to brand tracking starts by structuring your measurement strategy around the three fundamental drivers. The first of these drivers, what we call Power in the Mind, reflects your brand's ownership of critical attributes in the perceptions of your clients. The second, Power in the Market, reflects the structural factors that can amplify or inhibit success. And the third, Power of Execution, reflects your organization's ability to drive its own success

Improve your brand performance by:

- Identify strengths and weaknesses of the brand
- Guide marketing actions toward positive brand building
- Maximize brand Power / perception in the market place
- Measuring the impact of your action
- Guide marketing investment to maximize ROI
- Adjusting your strategy

*We focus on the following key areas to help you asses & track brand power;*

- Is your brand image developing as intend?
- Identify the key drivers for brand power that would guide management in developing strong brand values?
- How physicians perceived your brand emotionally & functionally VS. competition?
- Identify the key attributes that shape prescribers satisfaction in a specific therapeutic area?
- Where you need to improve your brand power/equity?
- What brand specific strengths and weakness?
- What additional psychological or rational benefits motivate brand usage behaviour?
- Is your brand stronger or weaker than it was last years?
- Which are the strongest brands in your portfolio?
- How do perceptions differ among drug users & non users?
- What benefits does physicians, patients, pharmacist & others professions seek from your drug? AND to what extend is your drug seen as delivering these benefits?





# Market Dynamics™

*"Your Support Tool For Strategic Brand Monitoring"*

*"Powerful marketing strategies must be built upon a solid understanding of market dynamics, managing uses accurate tools and real-world market dynamics to identify the factors that will drive growth of your brand"*

WE GUARANTEE YOUR BUSINESS GROWTH & VALUE

**G**rowth and value are two things sought by all pharmaceutical companies.

Growth is necessary because it is the only way forward; staying still is not an option as others will pass you by, while declines a sure movement towards extinction.

Value enables you to achieve higher contributions from your sales and more returns from your resources.

Market Dynamics™ we have developed innovative and traditional qualitative and quantitative techniques to capture the dynamics of the competitive environment, the power of your brand and its competitors in the minds of key constituents, and the structural factors that can make or break market success.

Pharma Dynamics approach to market dynamics monitoring is to insightfully track changes in attitudes, behaviors, perceptions and even market structures that have strategic implications for your brand across Multiple decision-makers, including patients, physicians and payers.

We focus on the following key areas to help you assess & monitor market dynamics;

- Market size and potential growth?
- Prescribing dynamics, include current and future usage patterns in relation to competitor products?
- How many new patients are being gained each month?
- Is the product being prescribed as a first-, second- or third-line brand?
- What about main competitors portfolio?
- Summarize your competitive position in relation to the attributes that drive the market?
- Physicians attitude, perceptions and behaviors?
- Competitive SWOT analysis (brand - by- brand details)?
- Who brand perceived among users & non users?
- What is the source or basis of these perceptions?
- Physician real needs and preference?
- Brand image versus competition?
- Critical success factors, including the attributes drive therapy decisions?
- Brand positions versus competition?
- Identify potential market opportunities and the most appropriate target patient types for your brand?

## **Our Goal:**

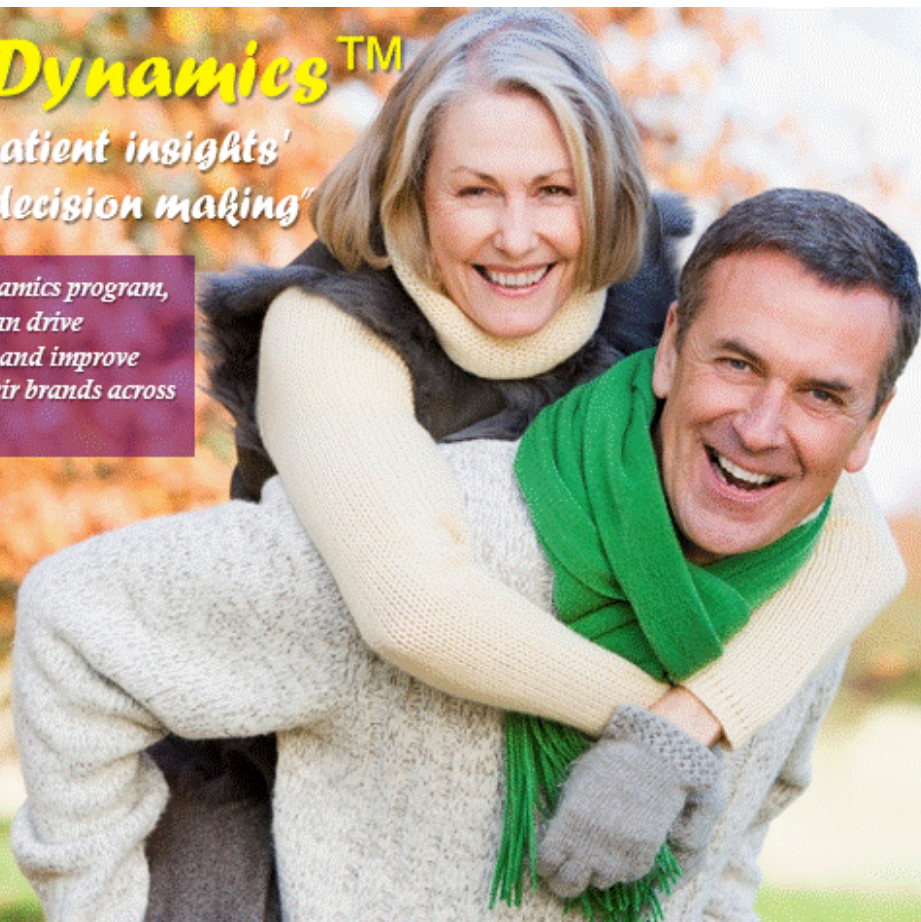
*"To ensure that clients are anticipating market opportunities and identifying issues, also that they have the real-world information they need to make mid-course adjustments, and to respond to ever-changing dynamics"*



# Patient Dynamics™

*"Understand patient insights' in healthcare decision making"*

*"With the Patients Dynamics program, pharmaceutical clients can drive commercial productivity and improve the way they manage their brands across the product lifecycle"*



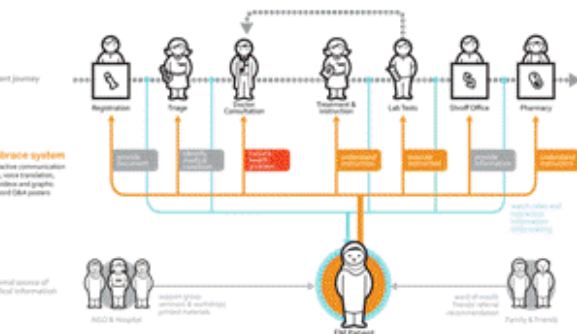
LISTEN TO PATIENT IN HEALTHCARE MARKET RESEARCH

*"We Provides comprehensive and timely anonymized patient intelligence in key markets in middle east to help our clients gain, and apply, a deeper understanding of patient behavior"*

**Increased access to the Internet and other media has resulted in patients becoming more knowledgeable and informed about their healthcare options.**

Targeting the patient through patient centered product development decisions, as well as through marketing and communication campaigns throughout the product life-cycle provides the opportunity to increase patient-driven demand, which ultimately impacts on profitability.

Our highly flexible approach provides you with the tailored information you need Patient research adds value across the board of business questions from early product development through line extensions and late life-cycle management.



**We focus on the following key areas to help you understand patients insights;**

**Define Innovation Opportunities By Explore Patient's Needs:**

- Market landscape / Unmet needs?
- Understanding the Patient Journey, how patients proceed through the care delivery system?
- Understand what happens to the patient, where it happens and who is involved?
- Exploring their underlying emotional drivers and barriers of choice?
- Product attributes, determining patient satisfactions?
- Identify key unique selling points (USP) as well as key barriers which allow tailoring of communication?

**Define Patients Segments:**

- Identify patients segments based on their needs and desired benefit which will serve as the basis for optimizing your portfolio?
- Who is likely to be prescribed the drug?

**Optimize New Product Features:**

- Measure patients preference, discover, compare and select the optimal product features which will enhance patients satisfaction?
- Forecast the potential of new products—is there a place for my product and where will it fall in the treatment algorithm?
- Marketing & communications strategies (message, concept and visual aid development)?
- What language & terminology should we use to best communicate with our idea?



# ATU Dynamics™

*"Innovative Method for Tracking Brand Performance"*

*"We provides a comprehensive knowledge about success of the brand, its strong and weak sides, position & perception"*

WE PROVIDE BUILDS A COMPLETE PICTURE OF THE MARKET

*"Track brand performance: the venerable  
"Awareness, Trial and Usage" or ATU"*

ATU study is essential to providing the team with a comprehensive scorecard by which to understand a product's performance and impact over time. Obtaining an accurate, complete understanding of the usage and attitudes in play is becoming more crucial

ATU Dynamics™ is a quantitative study employed to examine the customers (*Typically physicians & patients*) degree of familiarity, perceptions and usage of a brand in relation to its competition.

*Used immediately after product launch helpful in:*

- Tracking (and enhancing) brand performance.
- Gauging whether sales representatives are communicating the correct messages to the physicians – as well as the impact those messages are having on physicians' prescribing.
- Understand differences in attitudes of users vs. nonuser comparisons often are extremely helpful in gauging why a certain proportion of the market may have taken on a new product while others have not
- Differences between users and nonusers also may reside in differences in normal adoption patterns, since certain physicians tend to be early adopters while others won't start prescribing until a product has been on the market for a period of time.
- Differentiate your brand from competitors and delivers insights.

We focus on the following key areas to help you encompass a spectrum of market-based dynamics;



## Physicians ATU

- Physicians unaided, aided awareness and familiarity of brands?
- Prescriptions habits, How many RTX, whom prescribe & why?
- Type of patients in which a brand is being used When and what circumstances, do they use the drug?
- Physicians perceptions of the brand vs. its competitors?
- What expectations do physicians have of the brand?
- What perceived importance of key brand attributes?
- What influencing physicians prescribing decision?
- What are the key entries for the market /potential?
- What about users and nonusers of the brand?
- Perceptual mapping to identify where the brand VS competitors?
- Brand message is being delivered to physicians, whether it is recalled – and understood – by customers?



## Patients ATU

- Patient satisfaction and experiences with the brand impacted their quality of life?
- How Patient participation in the treatment decision-making process?
- Evaluation of how the brand performs based upon patient expectations (as well as vs. previous medications taken)
- Patient recall of direct-to-patient/consumer (DTP/DTC) advertising, both in terms of location and message delivered
- Patient recognition and utilization of promotional programs such as discount cards or co-pay coupons



# Segmentation Dynamics™

"Your First choice for confirmed Brand Success"



*"Identifying needs and recognizing differences between groups of customers is at the heart of marketing"*

THE NEW STANDARD FOR CLEVER SEGMENTATION

Doctors and patients can all have differing needs, Understanding these needs and how to segment your customers in a commercially relevant way is both an art and a science.

*"Market segmentation is about understanding the different groups of customers, influences and prospects and how their needs, desires, capabilities and characteristics differ in ways that impact your product's potential"*

By understanding customer segments through application of a segmentation approach customized to your business objectives, you can refine your strategies or shape your messaging to better align your initiatives with your audience's needs.

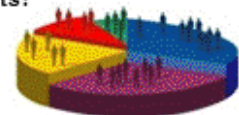
Satisfying people's needs and making a profit along the way is the purpose of marketing. However, people's needs differ and therefore satisfying them may require different approaches. Ultimately, proper segmentation can lead to increased satisfaction by users of your products and services, including health care professionals and patients.

When you understand customer segments, you can better target their needs and allocate marketing resources across segments based on their value.

*"Segmentation Dynamics™ our approaches that ensure that only the most powerful attitudes and behaviors drive your segmentation solution also working in partnership with you, we carefully determine what type of segmentation approaches best suits each situation"*

We focus on the following key areas to help you in clever targeting & segmentation;

- How the market segmented?
- The most potential market segments, Which group could be targeted How the market segmented? Who prescribe, why and where?
- When and what circumstances, do they use the drug?
- What expectations do physicians have of the product? how physicians perceived current drugs? What do they think the ideal drug should be like?
- What are the key entries for the market and how great is the potential?
- Differentiate products/services in line with your customers
- Improve your competitive positioning?
- Shape your product offering and pricing strategy to fit the markets with most potential?
- Concentrate on providing profitable products or services?
- Target marketing and selling efforts?



Proposed Customer Segmentation

	Low 1-40%	Medium 41-70%	High 71-100%
High	UNDERSTAND and GROW	GROW	PROTECT
Medium	UNDERSTAND and GROW	GROW	PROTECT
Low	CS PRIORITY		UNDERSTAND and PROTECT



# SFE Dynamics™

*"Understand the impact and influence of your sales force"*

**U**nderstanding current sales force effectiveness and efficiency is the first step in identifying opportunities for change that will maximize your field force ROI.



*"Pharma Dynamics delivering deep insights into sales force effectiveness performance indicators"*

**IDENTIFIED THE KEY DRIVERS OF SALES SUCCESS**

Sales force represents the largest spend in sales and marketing, with the ever increasing pressure to ensure maximum return on investment, sales force effectiveness is becoming a high priority area in the global pharmaceutical industry.

In today's competitive market, companies often need to restructure their sales organization and evaluate their sales rewards strategy to gain competitive advantage and optimize individual performance. An inefficient force can have an enormous effect on brands

Building a positive workplace that promotes employee engagement and encourages talented salespeople to attain high performance targets

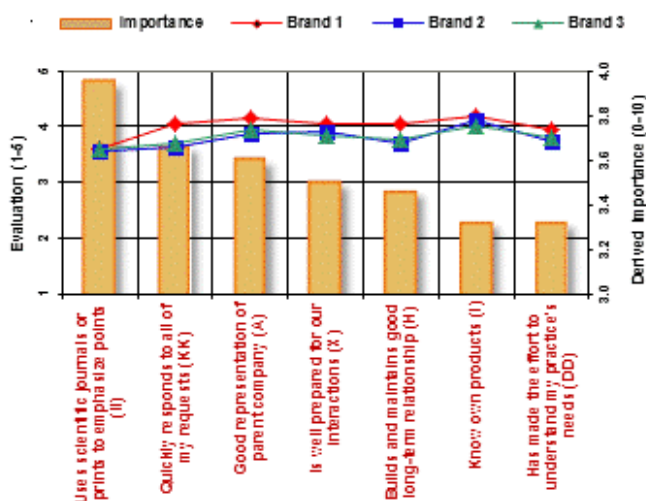
Many companies struggle to understand the effectiveness of their sales force, but doing so can push pharmaceutical companies past today's hurdles and into increased productivity and coordinate sales resources in order to generate **"more calls and better calls"**.

**SFE Dynamics™ Provide :**

- Unique approach and advanced analysis techniques help to reveal your performance, identify your sales force strength and weakness and benchmark with competitors
- Identify unmet needs related to physician and sales force relationships
- Identifying the impact of your sales force and campaigns on doctors' prescribing decisions
- Assess sales force impact on company image
- How you can really optimize your sales force and marketing messages
- Provide actionable recommendations to improve your sales effectiveness
- Provide a Solid foundation for decisions on the potential investment areas that will deliver the greatest financial & operational improvements
- Studying top sales performers and sales managers to benchmark best practices & rewarding superior performance sales force

We focus on the following key areas to help you identify SF areas for improvement that matter ,

- What are key strength & weakness of your sales force?
- Is your sales force deployed in the most efficient manner?
- What are the differences in effectiveness/efficiency between your sales force VS. competitors ?
- How physicians perceived your sales force & company image?
- What sales force impact on prescribing, including reasons for product choice?
- How effective is your sales team in promoting to specific market segment VS. all customers?
- Where can we invest resources to immediately improve your sales force results?





# Price Dynamics™

*"Know sooner rather than later"*

*Manage pricing strategy throughout the life cycle*

*"Our target is to help you optimize your volume, value and profitability by optimizing the price architecture of your entire portfolio"*

POWERFUL TOOLS TO GET YOUR PRICE SPOT ON

*"Our target is to help you optimize your volume, value and profitability by optimizing the price architecture of your entire portfolio"*

Price is both a powerful sales driver and a key determinant of profitability. It plays an important role in the purchasing decision.

With today's business focus on ROI, you need to ensure that your products and services will command prices that are in line with business objectives.

The price or perceived value of a product is a key element in its branding and most open to internal scrutiny within your organization.

Price Dynamics™ pricing evaluation process recognizes that multiple decision-makers, including patients, physicians and payers.

**Price Dynamics™ can help:**

- Assesses the value of drug features
- Provides information that allows you to command the highest price in a competitive environment
- Verify pricing assumptions
- Understanding how different brand features and market factors can impact product pricing
- Optimize brand development and track the price that will produce the greatest revenue for product

We focus on the following key areas to help you in innovation & powerful pricing strategy;

- How much will a respondent pay for an added-value drug?
- What is the share of preference, or price elasticity, at each price point?
- How much target markets pay for each additional feature?
- Which price optimizes your market share, revenues or profits?
- How will the market react if you raise your prices by 5%?
- What is the best price strategy when launching a new product?
- What packs and formats to use, which line-up of pack sizes and formats, and what price point best captures opportunity?
- How much are your brands impacted by competitor price changes?
- What about price changes of other brands within your portfolio?
- Determine interactions between retail channels, What is the price sensitivity for your products in drug stores vs. pharmacies?

*Choice-Based Conjoint (CBC) is considered a strong tool for pricing research, depend on interactive price scenarios test*

Ex. Which of the erectile dysfunction products would you be most likely to purchase



## Scenario 1

 Lilly Dose 20 mg 36 Hours \$ 20	 Pfizer Dose 50 mg 6 Hours \$ 25	 Bayer Dose 10 mg 48 Hours \$ 30
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## Scenario 2

 Pfizer Dose 100 mg 24 Hours \$ 30	 Bayer Dose 20 mg 36 Hours \$ 20	 Lilly Dose 30 mg 24 Hours \$ 30
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# Position Dynamics™

"Intellectual essence of your brand"

**P**roduct positioning represents the intellectual and emotional essence of your brand

"It provides the core foundation upon which your marketing strategy, messaging will be built and the basis for your brand's success"

"Pharma Dynamics recognizes the importance of building positioning that are credible, differentiating, sustainable, and consistent with your organization's long-term aspirational strategy"

EXPLORE BASIS FOR YOUR BUSINESS SUCCESS

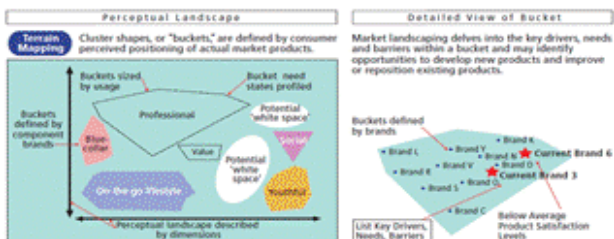
Establishing the health care brand position – the advantageous location that a product owns in the minds of physicians – is one of the most challenging components of marketing campaign development which drives the development of all subsequent marketing communications.

### Benefits of Strong Corporate Positioning:

- Premium prices can be charged
- Physicians, patients, pharmacist & payer will ask for the drug to prescribe & use
- Competitive products will be rejected
- Communications will be more readily accepted
- The product can be developed and built
- Customer satisfaction can be improved
- It adds power within the distribution network
- Licensing opportunities can be opened up
- The company / product will be worth more if it is sold

Brand teams have a map they can use to determine their product's most profitable place in the market.

Pharma Dynamics has developed an alternative approach allows physicians to build positioning statement themselves.



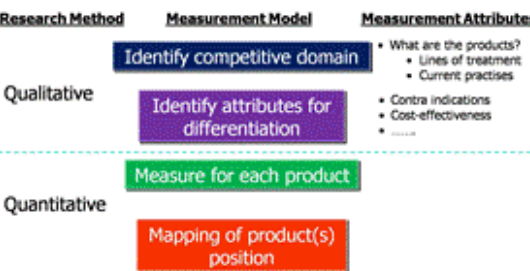
We focus on the following key areas to help your brand's success;

- Provide insight into the brand's positioning vis-à-vis its major competitors including its strengths, weaknesses, opportunities and threats clearly displayed in maps?
- Plan new product positioning tuned to the market needs
- Identify areas where I need to position MY product
- How to reposition a brand in the image competition to increase brand potential and market share.
- What kind of creative platform can be used to create a unique position/ reposition)

### Position Dynamics™ process includes:

- Deep customer insight through exploratory and projective qualitative & quantitative approach's to unearth both the functional and emotional benefits of your product
- Multi-dimensional testing including cognitive/rational assessments of various positioning

### Positioning Model





# VOE Dynamics™

"Listen to Voice Of The Customers"



"Our survey analyses provide your organization with the tools to improve organizational performance and profitability"

ACHIEVE A COMPETITIVE EDGE WITH SATISFIED CUSTOMERS

Customer satisfaction is the state of mind that customers have about a company when their expectations have been met or exceeded over the lifetime of the product or service.

The achievement of customer satisfaction leads to company loyalty and product repurchase



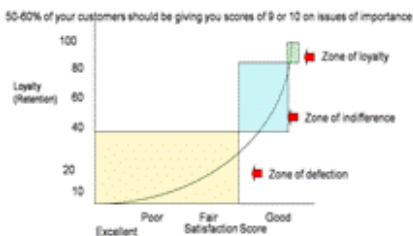
We focus on the following key areas to help in improving organization performance;

- Are customers satisfied?
- What about customer real needs?
- What are their expectations & requirements?
- How well your company and its competitors are satisfying these expectations and requirements?
- What makes your customers loyal?
- Where you can investing in areas which increase satisfaction of our customers?
- How to developing service and/or product standards based on your findings?
- Tracking, satisfaction trends over time in order to take action on a timely basis?

## Customer Satisfaction Measurement Facts:

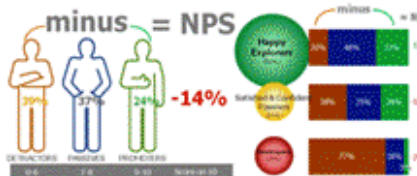
- %5 crease in loyalty can increase profit by 25%
- A very satisfied customer is nearly six times more likely to be loyal and to repurchase and / or recommend your product
- Only 4% of dissatisfied customers will complain
- The average customer with a problem eventually tells nine other people.
- Satisfied customers tell five other people about their good treatment

### WHERE ARE YOUR CUSTOMERS?



### LOYALTY ?

To what extent you be willing to recommend drug to your colleague  
10= Absolutely Yes  
0= Absolutely not



### AREAS FOR IMPROVEMENT





# Message Creator™

"Discover the optimal messages for brand"



*"Our market research experts will select the ideal qualitative or quantitative tools available to help you tailor your messages to different target audiences, to understand how effective different messaging is and which is most likely to drive your brand's success"*

DEVELOP RIGHT MESSAGE AT THE RIGHT PLACE

*"Our market research experts will select the ideal qualitative or quantitative tools available to help you tailor your messages to different target audiences, to understand how effective different messaging is and which is most likely to drive your brand's success"*

Message selection process can be a challenging one. It is important to communicate the benefits of your brand in a way that is clear, relevant and impactful

When the creative process provides you with an overwhelming list of candidate messages to support your brand, which ones should you use pricing, cutting edge, innovative, trustworthy, etc.)

Message Creator™ process aims to solve this by providing your brand team with customer guidance to craft a clear communication that resonates in the market.

We developed strategic Messaging tools, that identifies the best message, and best message combinations, to motivate your audience.

Message Creator™ allows you to:

- Building the message platform
- Determine the best elements for brand identity
- Identification of essential message components
- Identification of ideal message configurations
- Give your creative team a head start
- Reduces the risk of wrong messages
- Ensure that you are communicating the best of the best
- To be a head of competition through focusing on physician actual needs

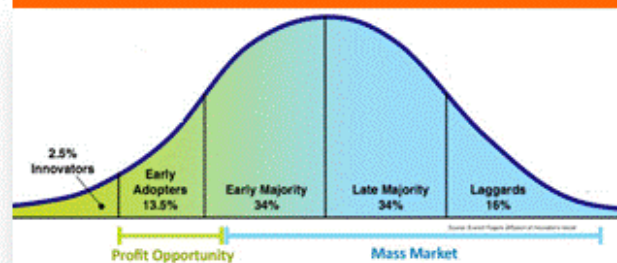
We focus on the following key areas to help in creative message creation process;

- What messages support your marketing efforts and resources?
- What messages provide the maximum interaction & concentration across product targets market?
- Which brand attributes and benefits contribute to the ideal positioning of your product or service must delivered in your message?
- Which attributes are cost-of-entry vs. those that are powerful drivers of intent to purchase?

We produce deliverables you can't afford to miss;

- Messaging the ideal message that Supports the positioning of your brand, product or service
- Drive sales through a message or group of messages that you'll have confidence testing in the marketplace
- Message creation based on adoption model

Message Creator™ based on adoption model Segmentation



Enthusiasts Visionaries Pragmatists Conservatives Skeptics



# Recall Spot++™ *"Powerful measure of call effectiveness"*

*"We deliver critical insights on the quality of your reps"*

ASSESSMENTS OF YOUR COMPETITIVE SALES CALLS

Much time and effort is spent developing the most persuasive product message, which is then delivered through the sales representative and other channels (e.g., online, print, etc).

Company must be **innovative, proactive** in testing your message VS main competitors, Measuring the return on investment of the messages being delivered is the goal of message response assessment



**Recall Spot++™ provide ;**

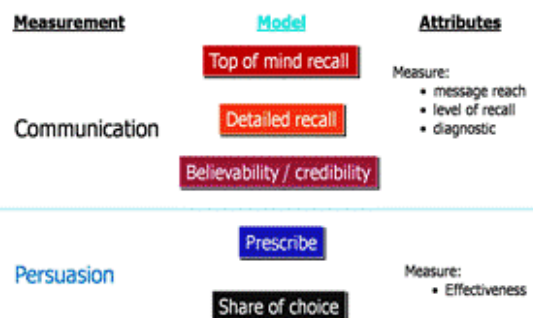
- Assessing physician / Reps dynamics & interaction
- Assessing Reps efficacy in instilling brand awareness
- Assessing impact of the messages on prescribing, "share of voice" (SOV)
- Quickly identify for any weaknesses in the selling process to improve rep performance
- Enhance sales presentations and detail aids
- Guide below-average reps in changing their actions to increase effectiveness
- Monitor competitive detailing (i.e., counter-detailing) activities and messages.
- Evaluating geographic differences, compare and contrast high and low -performing sales areas, and determine the key drivers behind the differences

We focus on the following key areas to help you monitoring the communications provided by MR;

- What detail messages delivered by your MR
- What about key competitors messages?
- Was clear to convey and communicate the message?
- Was effective in reaching and enhancing physicians?
- What % of required message received ?
- What about message diagnostics
  - (Importance / believability & uniqueness)
- What sales support materials used by MR?
- How MR call impact on physicians future prescribing?
- How MR call impact on company & product image ?

*"Recall Spot++™ offers innovative method to measure Message Recall effectiveness"*

## Message Recall Model





# Oncolink ++™

*"Innovate insights for oncology market dynamics"*

*"We provide the most golden standard, oncology-focused custom marketing research that will definitely become your essential partner for extensive patient & product roadmap"*

IN-DEPTH UNDERSTANDING OF THE ONCOLOGY LANDSCAPE

**Oncology, become the first largest and fastest growing therapeutic class in the world, with annual sales about \$80 billion.**

With 10 new oncology products slated to launch in 2011 and more than 58 products in Phase III clinical trials or pre-approval stage, Pharma companies should be prepared for the intensifying competition ahead.

Middle East oncology market considered one of the most fast growing markets across the world in many indications as Breast, Lung, Colorectal and Bladder.

Oncolink



**Oncolink Tracker™ provide:**

- Monitor and evaluate Brand performance
- Insights into therapies and reasons behind usage
- Identify and quantify market dynamics, drug potential, unmet needs and awareness and opinion of novel drugs
- Assess treatment algorithms with patient shares, including all treatment regimens and all substances
- Understanding & asses market drivers and dynamics of each cancer indication within the context of local markets
- Assess, navigate and anticipate the market and ultimately develop actionable solutions for your brand
- Assessment of new treatments in development

We focus on the following key areas to help you Understanding of Oncology Challenges;

- Market Size / Patient Flow/ Demographics?
- New Cases I/S. Follow Up
- Disease diagnosed, Prevalence, Incidence, Grades, Risk Factors, Symptoms & Death Rate?
- Patient split across Cancer stages
- Treatment Practices Pattern/ Dynamics
  - Treatment algorithms
  - Therapies usage Chemotherapy, hormonal, radiotherapy...etc & why?
  - Chemotherapy regimens & protocols usage
  - Usage level of drug / cancer stage
  - Planned length of treatment & dose / cycles
  - refractory and relapsed
- Market Drivers / Dynamics (usage utilities)
  - Why doctors prescribe & when
  - Factors influencing treatment choice
- Brand performance (SOM%) across;
  - Disease Stages
  - Total Market VS. Define Market
- Who are the competitors and what is their portfolio?
- Mapping per cancer indication





# OncoTracker™



**"Staying Ahead In The Oncology Market's Golden Age"**

COMPLETE & ADVANCED STRATEGIC OUTCOMES

- Providing a quantitative facts, and figures about market share of current newer chemotherapeutic agents through auditing cancer centers outlets
  - Actual Sales / Consumption

**Two Parameters For Market share Calculation**

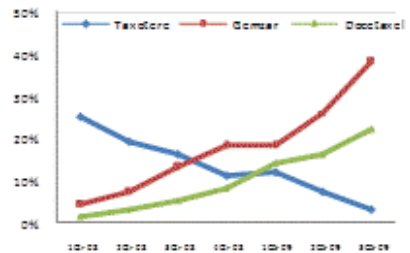
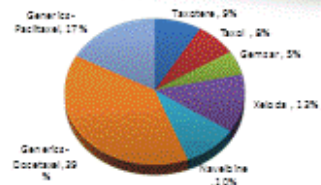
**Patients**

**Sales Value**

*OncoTracker™ combine real market share audit with medical oncologists share of preference in a very dynamics & competitive reports providing;*

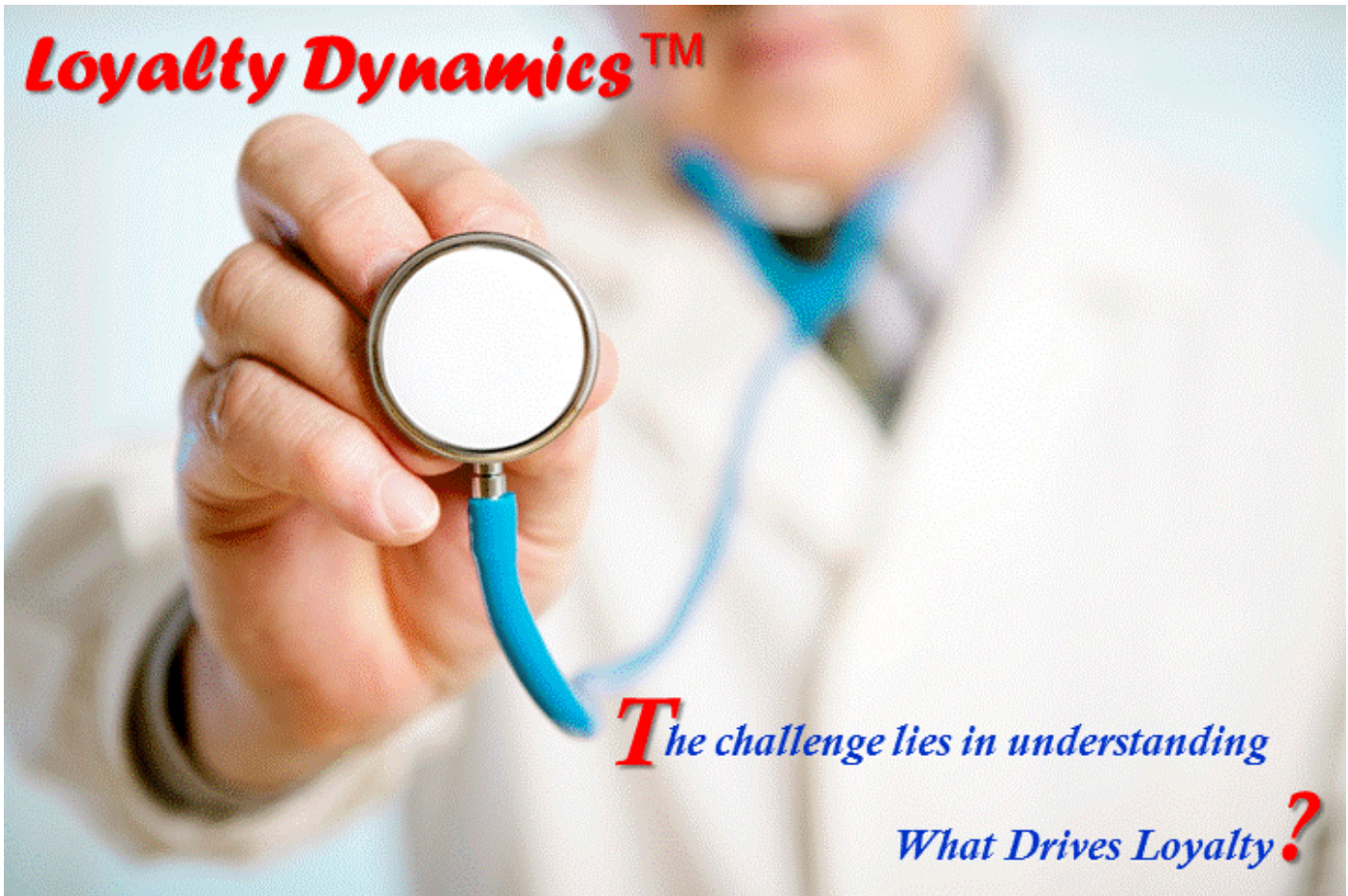
- Patient share per cancer types & stages
- Product share per cancer type
- Product value share based on real prices (MOH, Institutions, Tender, final patient prices)
- Generics penetration
- All data clustered by
  - Country regions
  - Treatment location /sector (private, governmental...etc)

**Onco Tracker**





# Loyalty Dynamics™



The challenge lies in understanding

What Drives Loyalty?

PRODUCES THE MOST SUCCESSFUL BUSINESS OUTCOME

As a pharmaceutical company you know that no matter how unique your product is another new brand can take its place tomorrow

To differentiate yourself from the competition, you need to work to increase revenue by building your reputation based on sales and service excellence, remembering that your customer's voice is the most compelling marketing tool

Most companies are here or here

For in-depth insights on how your brand and/or company are perceived by your target markets



Loyalty++™ allows you to identify practitioners who prescribe your product and those who favor your competitors (Indifferent) and wow factors that create strong loyalty (True Loyal)



We focus on the following key areas to help you powerful loyalty assessment & segmentation ;

- What about prescription/usage /recommendations share for your product VS competitors?
- What about level of satisfaction for;
  - Product features such as efficacy, safety..etc?
  - Company image?
  - Company marketing program?
  - Sales reps interaction?
- Key drivers affect customer loyalty
- How we can improve company's position?
- How we can improve company's loyalty ?

**L**oyalty++™ Essential part of a company's improvement management. It provides concrete indications for the improvement of a company's position within it's competitive environment and for the specific increase of customer retention to a certain company.



# KOL Dynamics™

*“Explore Leaders Insights”*

*“By recognize that key opinion leader (KOL) management is a critical component, the more you reach & interact with them the greater your opportunities for the success”*

IDENTIFY POTENTIAL OPPORTUNITIES AND THREATS FOR BRAND

Relationships with **thought leaders** in medicine help biopharmaceutical companies continue understanding and addressing the illnesses and diseases.

ROI is the new language of success within today's managed care world recognizes that accurately identifying key opinion leaders is critical to the success of a brand, beneficial relationships and engagements with KOLs Key opinion leaders need to be engaged on a ongoing basis to derive their full value

This creates challenges for marketers as information predicting KOLs response to new products, marketing initiatives, and formulary restrictions becomes harder to ascertain. Understanding the impact of contracting and medical management restrictions on physician utilization of Pharma and biotech products also demands use of physician advisors.

During the past few years, the evolution of KOL Relationship Management has accelerated, and companies' perspectives are maturing. The focus has shifted from knowing who the KOLs are to what are the optimized activities with KOLs. Five years ago, I would need to convince my customers of the value of influence mapping. It has become a standard activity for market research, and this increased investment has helped to drive this shift in focus from WHO to WHAT Smart companies recognize that KOL Management is more than a database and hot functionality.

*“Feedback from Key Opinion Leaders (KOLs) is truly a thinking man's game. It requires resources, strategy, planning and tactics, and a discipline with measurable objectives to demonstrate success”*

We focus on the following key areas to help you in mapping & understand KOLs Dynamics,

- What component of keeping KOLs current and motivated?
- What are the role of KOLs beyond prescribers?
- What are KOLs Prescribing Drivers?
- How KOLs response to your product?
- What marketing approaches meet KOLs expectations?
- What are the necessary components of a successful KOLs Management program?
- What changes taking place in relation to KOLs?
- How KOLs can be engaged/ Satisfaction level?
- How to move different decision makers from “current” to “desired” behavior (description of key drivers, motivators)?

## *KOL Dynamics™ Strategic Tool for ;*

- *At the early stage of product development , we would often recommend challenging KOLs*
- *Detailed insight into the decision-making process (including all influencing parties and factors)*
- *Assess local KOLs understanding of epidemiology*
- *Identify opportunities for market development*
- *Understand the key drivers for formulary acceptance*
- *Assess factors that influence committee members'*
- *Assess perceptions of a product, in order to influence its inclusion or rejection on the formulary*
- *Maintaining comprehensive institutional knowledge about the KOLs*



# Employee Optimizer™

"Your Business Barometer"

"Companies who feel responsible for their employees conduct employee surveys in order to adequately manage their human resources"



**L**eading Organizations Understand that their workforces are increasingly becoming their most powerful, and unique, source of competitive advantage

Few would argue that the most valuable resource of any organization is its people. Staff well-being and their level of satisfaction and engagement has been found to directly impact on organizational performance and ultimately organizational success. Dissatisfied employees tend to perform below their capabilities, result in high turnover of staff and leave their jobs relatively quickly.

Employee surveys are a suitable instrument for companies of all sizes to develop their performance capabilities and competitive advantage in a cost effective manner. Employee satisfaction research gives employees 'a voice'

### Why Employee Optimizer™

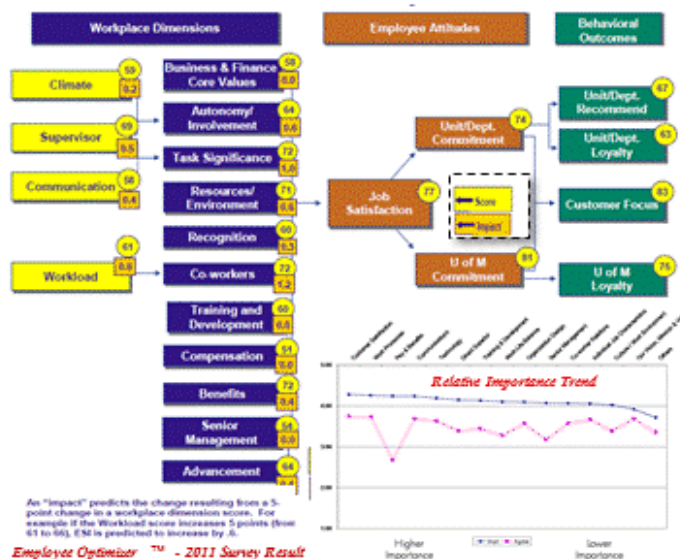
- Improves a company's knowledge and understanding about employees' interests and opinion
- Diagnoses the strengths and weaknesses in the company's relationship with its employees
- Measuring organizational culture to increase employee motivation, commitment and boost productivity
- Initiates a feedback process for employees and executives which can assist in developing leadership skills
- Involves employees in a continuous improvement process
- Provides performance figures for quality management systems
- Helps impact customer satisfaction and overall company performance by increasing employee commitment and optimizing corporate communications

### Elements of Job Satisfaction;

- Career Development
- Relationship With Management
- Work Environment
- Compensation and Benefits
- Mission and Purpose
- Personal Expression/ Diversity
- Communication
- Workplace and Resources
- Quality and Customer Focus
- Teamwork



### Overall Road Map



DELIVERS ACTIONABLE ANSWERS



**ESP Power +++™**

*"Your Corporate Success Secret"*

**3 in 1**

*"Your powerful & strategic tool for Corporate Image Improvement"*

**C**orporate Image study useful as a means of identifying key performance areas within organization that can be targeted for improvement, or to identify weaknesses in the performance of competitors that may be exploited.

"A corporate image is the sum of the impressions that stakeholders (like customers, vendors, employees and the public) hold about your company — in other words, your reputation"

**ESP Power +++™**

Our unique, complete & advanced model for corporate image assessment, covering 3 key elements;

### **Corporate Reputation**



*"Maximize Your Image, develop action plans to improve the health of your company and follow-up on your image over the years"*

- Identify and profile your corporate image strengths and weaknesses?
- What thoughts and feelings come to mind when a clients thinks of your company V/S. competitors? And Why?
- How is your company positioned in the minds of customers?
- What makes your company uniquely different (Emotionally & Functionally)?
- What key benefits & add values does your company offer?
- Where you need to improve your corporate image & adjusting your strategy?
- Guide marketing actions toward positive Image building V/S. competitors?

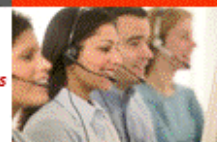
### **Sales Force Effectiveness**



*"Pharma Dynamics delivering deep insights into sales force effectiveness and efficiency"*

- What are key strength & weakness of your sales force?
- Is your sales force deployed in the most efficient manner?
- What are the differences in effectiveness/efficiency between your sales force V/S. competitors ?
- How physicians perceived your sales force image?
- What sales force impact on prescribing, including reasons for product choice?
- How effective is your sales team in promoting to specific market segment V/S. all customers?
- Where can we invest resources to immediately improve your SF results?

### **Promotional Programs**



*"Is promotional Programs Spending Worth it?"*

- Evaluate the effectiveness of your promotional activities/programs V/S. competitors?
- Identify key weakness & strength?
- How your promotional activities/ programs meet with customers needs?
- Identify key promotional activities which directly impact on physicians, pharmacists & patients final drug choice decision?
- Identify promotion impact on the company / brand image?
- Determine how the promotion could be improved? Providing future guidelines?



# Promo Dynamics™

*"Communicate Health Benefit Effectively"*

## Why Test Early-Stage Creative Promotion Ideas And Concept?

Promotion Is One Of The Most Expensive Marketing Functions, About 50% Of All Promotion Is Largely Ineffective. No One Is Smart Enough To Know How Consumers Will Respond To A Given Commercial. Without Objective Research, It's Just A "Guessing Game"

*"Pharma Dynamics offers an array of research services to help optimize marketing strategy, improve promotion effectiveness, optimize advertising concepts, generate and screen creative ideas"*

We Offers Sound Insights For Developing A Winning Campaign

### Promo Dynamics™ Is Designed To Tell You ;

- Evaluate and improve advertising concepts and early-stage print ads, TV storyboards, and radio scripts before the expense of final production.
- Predict the effectiveness of the finished (or near-finished) promotion ad or commercial compared to normative data.
- Provides a comprehensive overview of the promotion's probable effectiveness, including extensive diagnostics feedback.
- Assess the effects of the promotion on the brand's image, Inform, Reassurance, Persuasion & Encouraging Usage.

*Advertising tends to work on the strength of the creative concept (i.e., the basic underlying logic, messages, and images)*



### Pre-Promo Dynamics™

- Print Ads
- TV Storyboards
- Outdoor Boards / Billboards
- Radio Commercials
- Newspaper and Magazine
- Internet / Web Pages

### How Does Work?

- A representative sample of 75 to 100 target-audience consumers are recruited to view each advertising concept.
- Each promotional ad or commercial is tested monadically.
- Respondents see the advertising twice, and then complete a battery of 60 questions and diagnostic ratings about the ad (Including open-ended and closed-ended questions)

### We Focus On The Following Key Areas To Help You Powerful Promotional Strategy;

- Measure the effectiveness of promotion concept?
- Attention Value - Will the advertising capture viewers' attention?
- Main Idea Communication - Which ideas are played back as central to the commercial?
- Missing Information - What else would viewers like to know?
- Likes - What did viewers like about the commercial?
- Dislikes - What did viewers not like about the commercial?
- Where the strength and weakness of promotional concepts?
- Understand market reaction to promotions concept such as
  - Uniqueness
  - Importance
  - Believability
- What language & terminology should we use to best communicate with our idea?
- Which promotion ideas have the greatest chance?



- Brand Reinforcement - Does the advertising increase interest in buying the brand (i.e., move the consumer in a positive direction)?
- Brand Purchase Intent - Does the advertising trigger interest in actually buying the brand?
- Suggested Improvements - How could the commercial be improved?
- The most potential market segments, Which group could be targeted as a result?



# AD Dynamics®

Is Advertising Spending Worth it?



*"Pharma Dynamics HealthCare's analytical approach for delivering real-time feedback from key health care audiences on promotional vehicles, It allows you to assess the impact of your marketing materials on their intended audiences, including physicians, patients, nurses and managed care executives"*

*AD Dynamics® is Pharma Dynamics HealthCare's analytical approach for delivering real-time feedback from key health care audiences on promotional vehicles. It allows you to assess the impact of your marketing materials on their intended audiences, including physicians, patients, nurses and managed care executives.*

## HOW DOES AD DYNAMICS® WORK?

is tailored to the product category and the client's objectives. is designed to accurately measure an advertising campaign's long-term effects, including the following:

- Brand awareness
- Advertising awareness
- Advertising message recall
- Advertising recognition
- Brand image changes
- Media usage patterns
- Indicate what needs to be changed.
- Test of digital promotional material concept
- Testing of promotional material, messages, positioning
- If Promotion Meets its Objectives? Return on Investment?
- Promotion impact on the brand?
- Inform, Reassurance, Persuasion & Encouraging Usage

### IDENTIFY THE IMPACT OF ADVERTISING CAMPAIGN REGARDING PERSUASION:

- Purchase/ Purchase intention.
- Identify groups of users (trial/repeated) and non-users to highlight the importance of each group and provide direction for communication.
- Consideration frame/Loyalty level (take decisions accordingly).

## WE FOCUS ON THE FOLLOWING KEY AREAS TO HELP YOU POWERFUL ADVERTISING STRATEGY;

- Attention Value - Will the advertising capture viewers' attention?
- Brand Name Registration - Will the brand name be noticed and remembered?
- Brand Reinforcement - Does the advertising increase interest in buying the brand (i.e., move the consumer in a positive direction)?
- Brand Purchase Intent - Does the advertising trigger interest in actually buying the brand?
- Brand Name Memorability - How memorable is the brand name itself?
- Main Idea Communication - Which ideas are played back as central to the commercial?
- Missing Information - What else would viewers like to know?
- Likes - What did viewers like about the commercial?
- Dislikes - What did viewers not like about the commercial?
- Suggested Improvements - How could the commercial be improved?
- How much the ad created brand awareness?
- Did the ad breakthrough the cluster of other competitors ads?
- Those who saw the ad are aware of the brand being advertised.
- As a result: was the media plan for this ad effective (medium used, #and frequency of airing/printing)

