



The Launch Command Centre

**A KPMG Discussion Document
on Launch Excellence**







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Facts and Trends Impacting Launch

The Launch Factors of Influence continue to grow and evolve at a faster pace than Pharma's capabilities and processes – The industry track record is less than inspiring

- A successful Launch is determined by Market Share, Market Rank and Uptake
- The first 6 months of the Launch determine the market trajectory of the drug
- More than 60% of Launches fail to achieve the target
- Less than 20% of the Launches that start below target course correct
- Increasing restrictions and access to prescribers dilute the impact of sales force and detail
- Most Pharmas don't have a dedicated Launch organization/capability due to lapses between launches
- New stakeholders with higher degree of influence are arising – Payer/Provider/Patient/Distributors
- Launches are evolving from "Big Brand Blockbusters" to "Smaller, Multi-Indication Brands"
- RWE is maturing and is viewed as an indicator/benchmark of pricing and value assessment
- The Orchestration, Awareness and Analytics, required to launch a drug exceeds current Pharma processes and structures – More Players, More Dependencies/Dynamics and More Data – ever accounted for

2

Issues and Challenges with Launch

Launch is not a core capability of Pharmas, executed in silo and leveraging and “Old Checklist Approach”

- Launch is viewed as a linear, silo based, checklist driven process – success is defined by completing a set of tasks and activities and performing a hand-off
- The investment in Analytics and Modeling are focused on reacting vs predicting
- Disconnect in Data and Insight – failure at converting research insight into action
- Global and Local implications are viewed and attacked in isolation
- Accountability and Empowerment are diluted across the organization – Clinical and Commercial – 2 different worlds at 2 different timings – Corporate Communications, Regulatory, only provide point in time inputs

3

Addressing Launch

Launch is a Complex Micro Cosmos with Organic and Dynamic Dependencies and it needs to be treated as such

- Launch has become a complex and sophisticated set of interdependent behaviors from a multitude of entities – inside and outside the organization, that continuously evolve
- Acknowledging and Understanding the Micro Cosmos requires a dedicated group of SMEs that continuously and consistently collaborate – the focus is not on the activities but the outcome
- Create the Launch Command Center to Identify, Understand, Model and Monitor the Ecosystem – an Independent, Dedicated, Transparent organization
- Shift the Paradigm – from performing “Selected Modeling on selected activities at points in time”, to “Model all stakeholders, and all activities all the time and real-time”
- Embrace novel approaches to pricing and market access – factor clinical data for Outcomes and Value, RWE needs to be a plan not a consequence, Patient segmentations Plus Biomarkers, horizon should expand to further indications, enhanced clinical developments, patient platforms



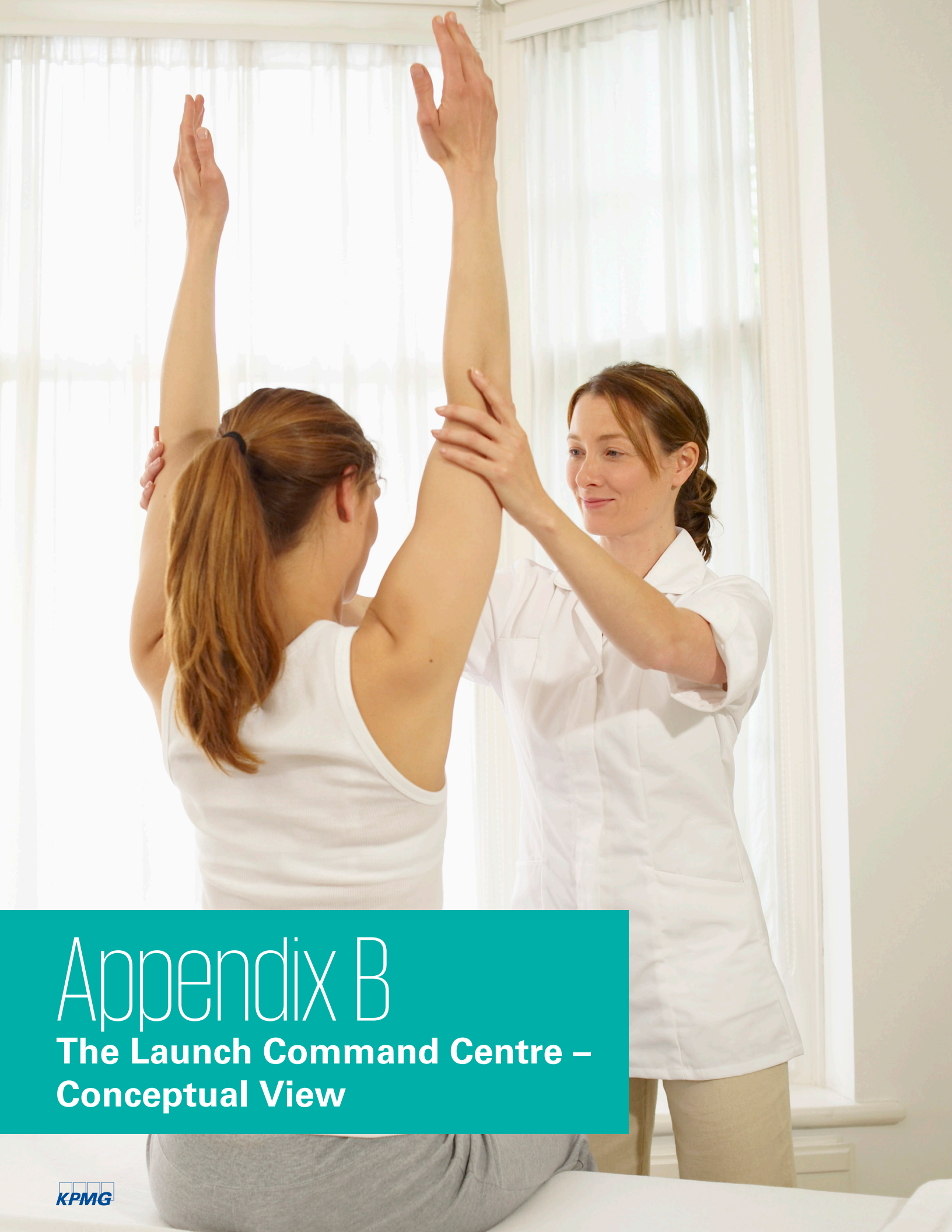


Appendix A

A View into the Digital Health and Market Ecosystem

The Launch Command Centre will account for digital health sectors, the data and influence in Launch Planning and Execution – moving away from the “Checklist” Approach

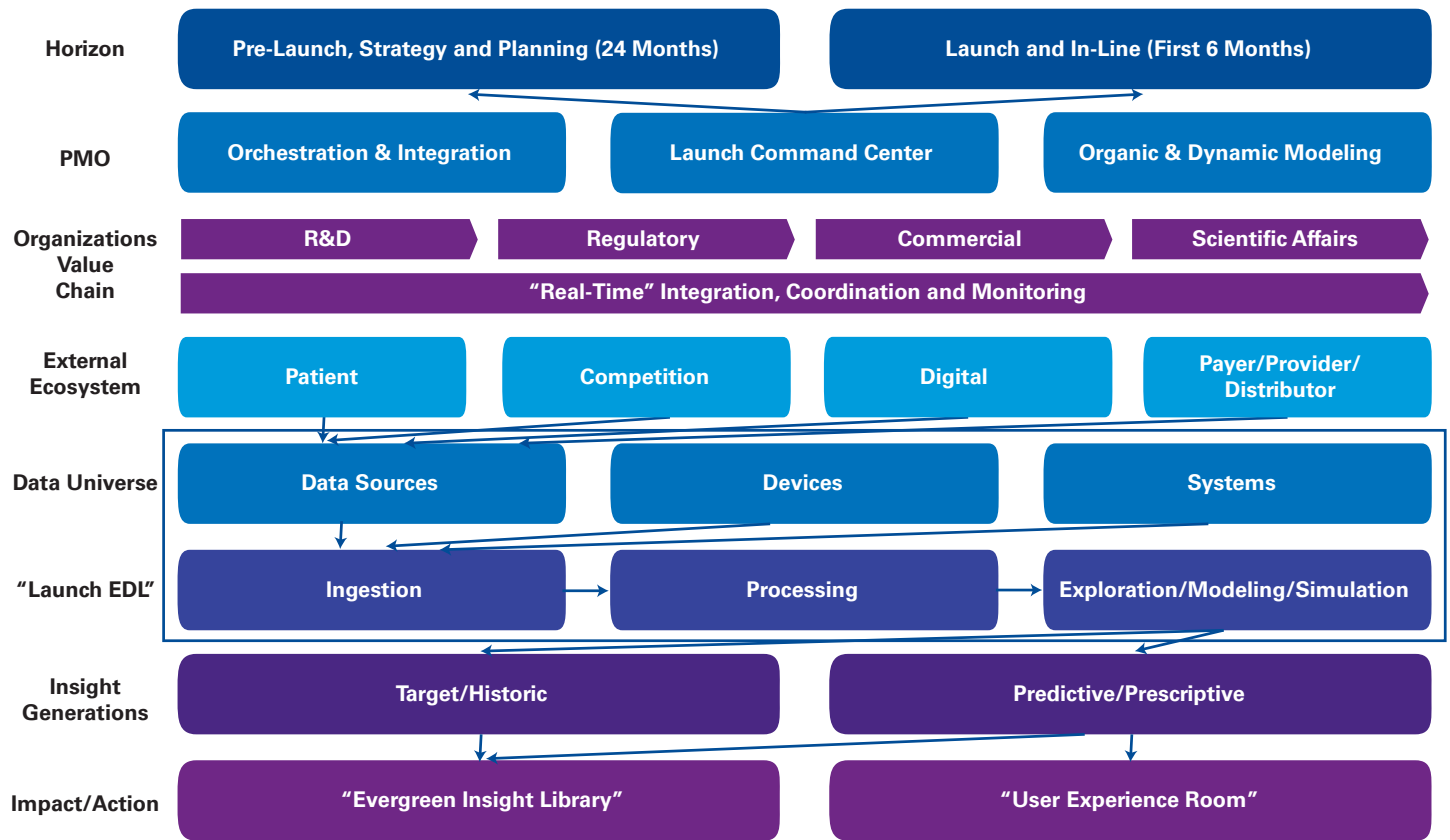
Sector	Definition and Impact
Remote Patient Monitoring	Understand and model the data (vital signs, physical health parameters, etc.) produced from a broad array of devices, services, and applications and predict the potential impact in Patient Adherence and Patient Support Programs
Clinical Research Management	Leverage the services, software, and apps that assist with clinical trial data collection for RWE and Outcomes Based models
Genomic Profiling	Model the impact of Clinical and DTC genetic testing and diagnostics – Patient Empowerment and Advocacy Groups
Personal Health Devices/ Wearables	Understand the market and segment of fitness and activity trackers, model the influence in adoption and adherence to plan for partnerships
Corporate Wellness Programs/Health Benefits	Understand the data and KPIs from corporate wellness programs, including digital platform providers, that are designed to support and encourage healthy behavior in employees to define RWE and Outcomes “Value Stories”
Telehealth, Patient/Provider Engagement	Understand the data and outputs from patient engagement services and leverage them to enrich “Analog Libraries”
Provider-Focused HIT	Understand the available data and models from Providers Healthcare IT solutions – clinical, operational or financial data – and incorporate the analytics into End-End to Launch Simulations (Launch, multiple indications, Regulation)
Insurance Plans / Exchanges	Understand the new payer and payer-marketplace entrants, their focus on improving the customer (consumer and/or employer) experience and create Uptake Simulations that account for health plan selection, coverage, and claims management
Care Systems and Services	Connect the dots and data across existing technology, consulting, and management services companies that provide analytics and operational transformation services to simulate prescriber/payer/provider behaviors – create the Course Correction Playbook
Nutrition/Weight-Loss/Wellness/ Fitness Platforms	Tap into the rich data world of numerous consumer-oriented apps and platforms focused on driving individuals’ engagement with personal health goals – model the Patient Power in combination with KOLs and Promotional Activities



Appendix B

The Launch Command Centre – Conceptual View

The Launch Command Centre will account for digital health sectors, the data and influence in Launch Planning and Execution – moving away from the “Checklist” Approach



Source: KPMG Analysis

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