CASE STUDY

DEVELOPING PRODUCT LAUNCH STRATEGY FOR AN ORPHAN DRUG FOR A SPECIALTY PHARMA

GO-TO-MARKET FRAMEWORK FOR SEGMENTATION AND TARGETING OF HIGH-VALUE HCPs

Launching a pharmaceutical drug is complex, however, in case of orphan drugs the process is even more difficult owing to the lack of knowledge about the disease state, fewer analogs to derive lessons from, and little understanding of patients' experience.

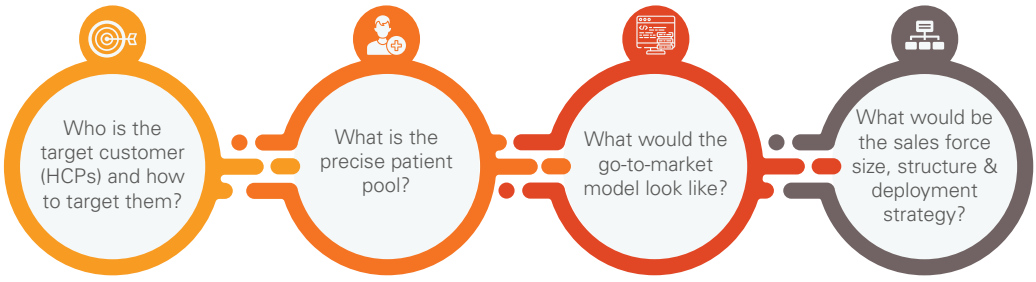
INTRODUCTION

With shrinking pipelines, increasing treatment costs, stiffer competition and stricter regulations, it has become tougher than ever for drugs to become successful. As per a McKinsey report[1], only one-third of newly launched drugs meet or exceed their pre-launch sales expectations. The scenario is even more difficult for orphan drugs given the the lack of knowledge about the disease state, fewer analogs to derive lessons from, and little understanding of patients' experience. Thus, pharma companies must invest early in the lifecyle of drug development to understand the requirements of the market and having a robust product launch strategy in place.

A well-planned go-to-market framework should follow an integrated approach from developing a winning commercialization strategy to operation. This illustration details how Axtria helped a pharma client develop a go-to-market strategy involving sales force size & structure, segmentation & targeting and alignment for a orphan drug launch in a rare disease.

BUSINESS SCENARIO

A specialty pharma company was in the advanced stage of launching a novel drug for a rare disease. The business team was struggling to answer the basic questions around target population, top treaters and treatment journey. Client partnered with Axtria to develop a commercialization strategy after a thorough analysis of the patients' treatment journey while answering the following questions:



AXTRIA
INGENIOUS INSIGHTS

CHALLENGES

Given the lack of data and limited understanding of rare disease, there were several unique challenges:

- The disease was marred with a high rate of misdiagnosis; thus, it was very difficult to determine the precise patient population
- The disease had a complex diagnosis and treatment process involving multiple HCPs making it challenging to determine whom to target
- The analysis involved use of multiple datasets including patient-level data and HCP affiliation data making it challenging to set up business rules
- Given the complex treatment and diagnosis patterns of the disease, patient level datasets involved several instances of a single patient being aligned with multiple HCPs thus making the process of HCP segmentation and valuation difficult
- Targeting also became challenging as the exercise required identification of HCPs who had most recently treated or diagnosed patients
- Difficulty in identifying high value HCPs as there was a difference between the ZIP information in patient and HCP data

AXTRIA'S APPROACH

Axtria followed a five-step approach to segment and target the HCPs and develop a go-to-market approach:

1. PATIENT JOURNEY AND SEGMENTATION SCHEMA

- The underlying segmentation factors were identified to determine HCPs' role in diagnosing and treating the disease state
- Business rules were developed to work with the longitudinal patient claims data to identify:
  - Diagnoses classified as proximate to disease state
  - Rx for disease state
  - Treatment regimens/regimen changes and titrations

2. CUSTOMER SEGMENTATION

- Segment profiles were developed to provide an in-depth view of current HCP behaviors and derive insights into segment drivers and barriers. Longitudinal patient level data was utilized to examine how these HCPs treat specific patient segments that were classified as priority targets
- Affiliations data, augmented by fuzzy matching of HCP demographic data, was used to identify linkages between segments

3. CUSTOMER VALUATION AND TARGETING

Using single attribution of patients, an HCP valuation methodology was developed to arrive at targets. HCP Valuation included the following characteristics of HCPs:

- Role – initial disease diagnosis vs. treatment initiation vs. regimen change vs. titration
- Duration of involvement
- Segment and referral behavior; and
- Involvement in refractory stage

4. SALES FORCE SIZE, STRUCTURE, AND DEPLOYMENT

- High value targets were defined and optimized coverage was ensured through a robust go-to-market approach including sales force size & structure and alignment
- Intuitive and impactful territory-/ region-level dossiers were created to enable rep productivity

5. KEY OPINION LEADER IDENTIFICATION

Axtria helped the client identify these KOLs by tracing referral networks across HCPs, using anonymous patient level (APLD) medical and Rx claims data. The criteria used were the following:

- Indegree (inward referrals) for disease state diagnosis, treatment initiation, and regimen change/titration behaviors
- Affiliations – within-GP vs. across-GP referrals
- Sphere of influence – local/regional/national (while indexing distances for population density)
- Valuation and caseload
- Known level of disease state advocacy, research and participation in disease specific national societies and associations

KEY TAKEAWAYS AND CLIENT BENEFITS

Axtria was able to provide the client with the following:

01

EFFICIENT TARGETING
Precise patient pool bringing efficiency to the targeting process

PERSONALIZED MESSAGING
HCPs clubbed into tiers based on the number of diagnosed and potential patients and their role and position in the patients' treatment journey to develop segment-appropriate messaging

02

03

HIGH-VALUE HCPS
Target list of key thought leaders and HCPs based on their valuation

EXECUTION STRATEGY
Targeted go-to-market approach including the optimal sales force size & structure and alignment while factoring in the local market nuances, real-world constraints, sales leaders' preferences and data gaps. This ensured best coverage of targets and opportunistic targets

04

05

DOSSIERS
Intuitive and impactful territory and region-level dossiers

CONCLUSION

Launch strategy can make or break the fate of a pharmaceutical drug. To give a strong head-start to the drug, early in its life cycle, it is important to have a deep understanding of the market and the customers. This is especially relevant in case of orphan drugs where there could be multiple stakeholders involved in various stages of the patient journey. Identifying the HCPs and KOLs that need to be targeted is of utmost importance in such a scenario. These high value customers can then be approached with segment-appropriate messaging.

Pharma companies must perform a thorough analysis of treatment journey to develop a fool-proof commercialization strategy. Orphan drug landscape poses a limitation in terms of limited data availability and understanding of treatment journey, however, by studying analog and proxy market it is possible to create an effective go-to-market strategy that could ensure launch success.

An understanding of end-to-end commercialization process, driven by strong expertise in advanced analytics, and deep experience of working in rare disease space are the precursors to ensure a successful orphan drug launch.

REFERENCES

1. https://www.mckinsey.com/industries/pharmaceuticals-and-medical-products/our-insights/the-secret-of-successful-drug-launches