

赢在起跑线 新产品上市中的得与失

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早、快、准、敏







COMPANY Strategy & Ambition



PROFILE and DIFFERENTIATION

MARKET Opportunity

- · Disease insights
- · Market characteristics
- Target group

CUSTOMER Insights

- · Patient treatment flow
- Customer needs, behavior, and attitudes
- · Physician and patient segmentation

COMPETITION anticipation

- Competitor benchmarking
- Competitor modeling and counteraction plan

PRODUCT positioning and branding

- · Positioning and messaging
- · Brand identity
- · Phase IV design and life cycle management



ACCESS and MOMENTUM

Market ACCESS Strategy

- · Market access scenarios
- Payer and HTA agency engagement
- · Market access strategy frame
- Regulatory management
- · Submission planning

PRICING and Reimbursement

- Value proposition
- Pricing frame and policy
- Innovative pricing
- Therapy and disease management
- Launch sequencing

MOBILIZATION and ROLLOUT

RESOURCE Planning and Mix

- Marketing and channel mix
 Field force resource plan
- Functional resource plan
- Resource ramp-up plan
- Partnering

MOBILIZATION and Activation of Stakeholders

- · Field force activity plan
- Stakeholder prioritization and targeting
- · Quality of interaction assessment
- Public relations and communications plan
- · Medical & scientific information plan

SUPPLY Management

- Supply strategy
- · Sales and demand forecasts
- · Production planning
- Distribution and packaging



Post-launch marketing



Key ENABLERS

Launch Planning, Budgeting, and Tracking

· Launch road map

· Brand plan

· Launch readiness checklist

- · Long-term financial forecasts · Launch dashboard
 - Launch dashboardReporting

STAKEHOLDER

Stakeholder mapping

Engagement strategies

Engagement

Advocacy

Launch KPIs

· Budget allocation

Launch ORGANIZATION and TALENT

Mobilization

· Talent planning

Operational strategyKnowledge transfer

- Incentive system
- fer Skill assessment and training



有力的 医学策略 明确的 品牌策略 优秀的 定价策略 创新的 商业模式

新上市产品的常见痛点



机制和技术的先进性与市场需求不匹配?

难以明确相对于现有竞品的差异化优势?

难以将差异化优势转化为<mark>患者获益和实际</mark> 销售表现?



医学策略对于新产品卓越上市的影响





有力的 医学策略 明确的 品牌策略 优秀的 定价策略 创新的 商业模式

认知→策略→执行









认知

减少对市场的认知偏差

策略

循序渐进搭建价值主张

执行

对齐策略, 贯彻执行







需要注意以下问题



预估潜力 ≠ 实际可行性

01 新患者

- 不一定出现在医院
- 不一定获得诊断
 - 不一定开始治疗

02 老患者

- 不一定在医院进行随访
- 不一定持续治疗
- 不一定调整用药方案







Top-down (自上而下)

- · 发病率等流调数据
- ・ 诊断/治疗率
- 患者流
- ・ 品类/品牌选择





Bottom-up (自下而上)

- · 医生手中的患者量
- ・ 患者接受度/负担能力/支付意愿



医院潜力评估与聚类

品牌市场份额潜力评估

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有力的 医学策略 明确的 品牌策略 优秀的 定价策略

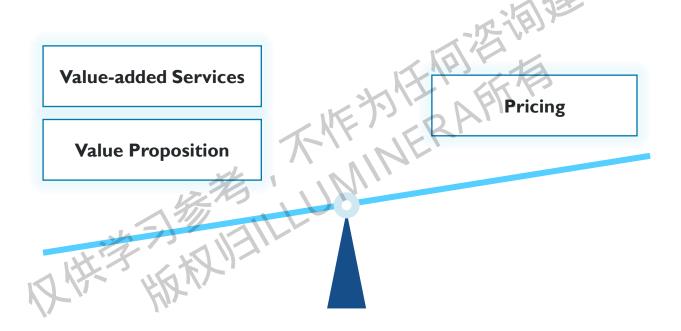
创新的 商业模式





Alter the price sensitivity curve to our advantage is the best pricing strategy









Regulatory Environment in China





Current Situation

- HIB* RDL threshold in recent negotiations
- ✓ Reference to the **global lowest price**
- ✓ **Less impact** on the medical insurance total fund (医保基金)
- ✓ More than 60+% price cut
- More products/categories are covered in VBP
- CFDA approval of new products and new indications has been accelerated

Consideration for Pricing Model Setting

- ? Range of test price: wider
- ? Launch price setting: Leave enough room for RDL price cut
- Other pricing factors before entering RDL:
 PAP can be an alternative way to boost both physicians'
 Rx experience & patients' usage

^{2...}

^{*} HIB: Health Insurance Bureau



有力的 医学策略 明确的 品牌策略 优秀的 定价策略 创新的 商业模式



患者为中心商业模式 赋能业务增长

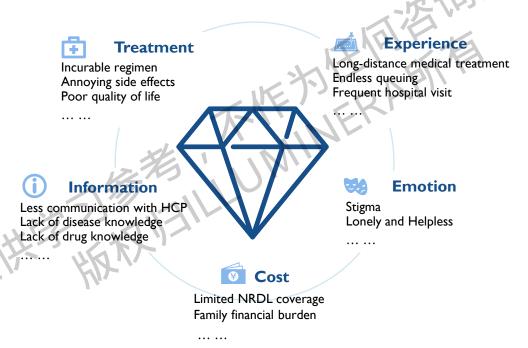
Patient-centric Business
Model Innovation

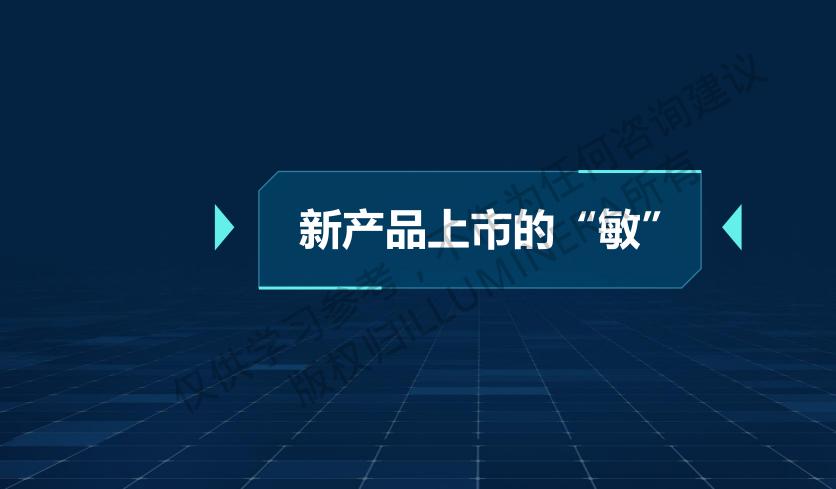






"Diamond Cut" of Unmet Needs





Key KPIs





Post-launch Marketing



Sales Volume & Revenue

- By region
- · By city tier
- · By channel
- · By hospital type
- By key hospital(top 10 sales contributors)
- · By department

Sales Growth Rate

· Business source



EXECUTION EXCELLENCE

Sales Force Effectiveness

- Sales reps coverage, frequency, detailing visits and social visits, etc.
- · Message recall
- · Sales visiting impact on future prescription
- · Sales rep satisfaction & performance evaluation

Promotional Activities Effectiveness

- Marketing activity participation and frequency
- · Activity satisfaction & performance evaluation
- Key message recall
- · Preferred marketing activities and forms



MARKET ACCESS EXCELLENCE

In-hospital Prescription and Usage

- Hospital listing progress
- · Hospital coverage and feasibility of in-hospital usage

MARKET MONITORING

PATIENT Classification & TREATMENT Behavior

- · Patient flow & classification
- · Therapy choice and brand choice
- Duration of treatment

DISEASE Understanding & TREATMENT Belief

- Disease knowledge
- Treatment goal
- Disease satisfaction level and unmet needs
- Treatment philosophy
- Key prescription criteria on therapy choice (onset speed, efficacy, sustained efficacy, etc.)
- · Key prescription criteria on brand choice
- · Perception towards categories & brand

TREATMENT Trend

 Policy impact (RDL listing, VBP etc.) on treatment model and channels

BRAND FOOTPRINT

Brand KPIs

- Market access
- Brand awareness
- · Brand TOM (top-of-mind)
- · Brand ever usage
- Brand PIM (past-I-month) usage

Brand Business Source

- Physician type
- · Patient type
- Rx source
- · Etc.

Brand Perception

- Performance on key factors
- · Brand satisfaction

Other KPIs



CUSTOMER AFFINITY



COMPETITION ANALYSIS





01

看清路 全盘掌握,提前布局

策略规划充分考虑产品生 命周期和中国市场特色, 在更早节点进行产品差异 化策略布局

02

早动身 赶早不赶晚

- 尽早启动产品上市策略 规划
- 尽早启动市场教育和市场预热

03

行得稳 扎实的长期策略

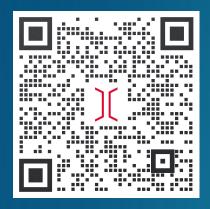
明确市场和生意本质,制 定扎实稳固的核心策略并 坚持落实

U4

走得远 持续优化

及时跟进市场、产品、竞品动态变化,持续优化执行策略

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