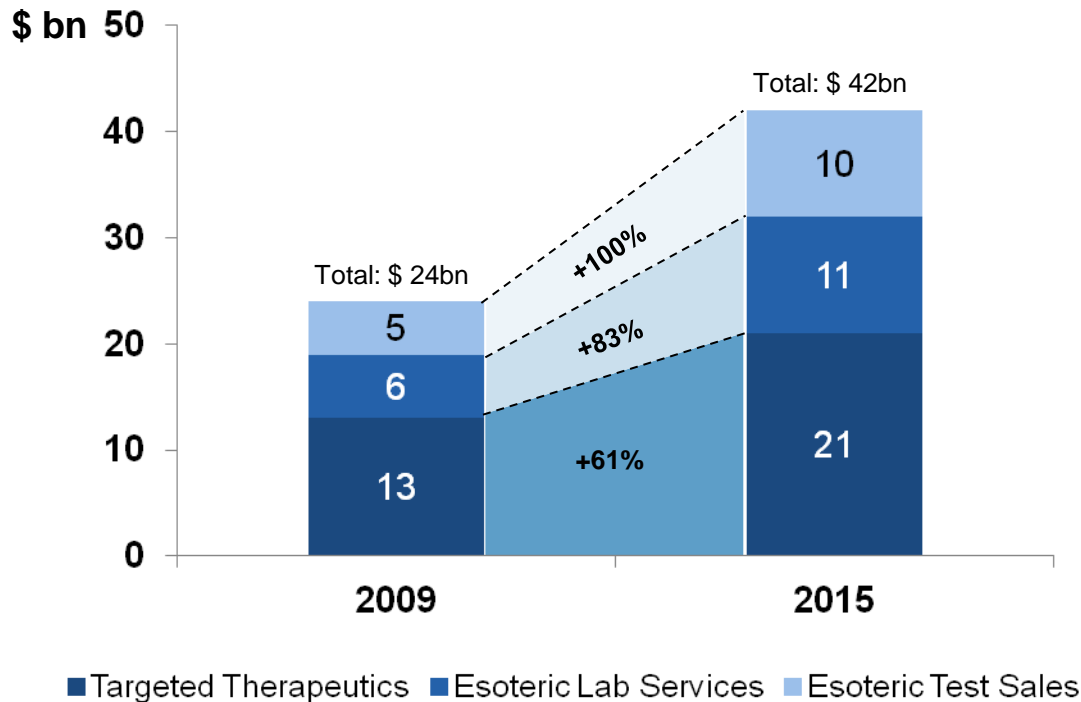


Personalized Medicine

How ready is the market for you
and how ready are you for the market?

The future clearly lies in Personalized Medicine

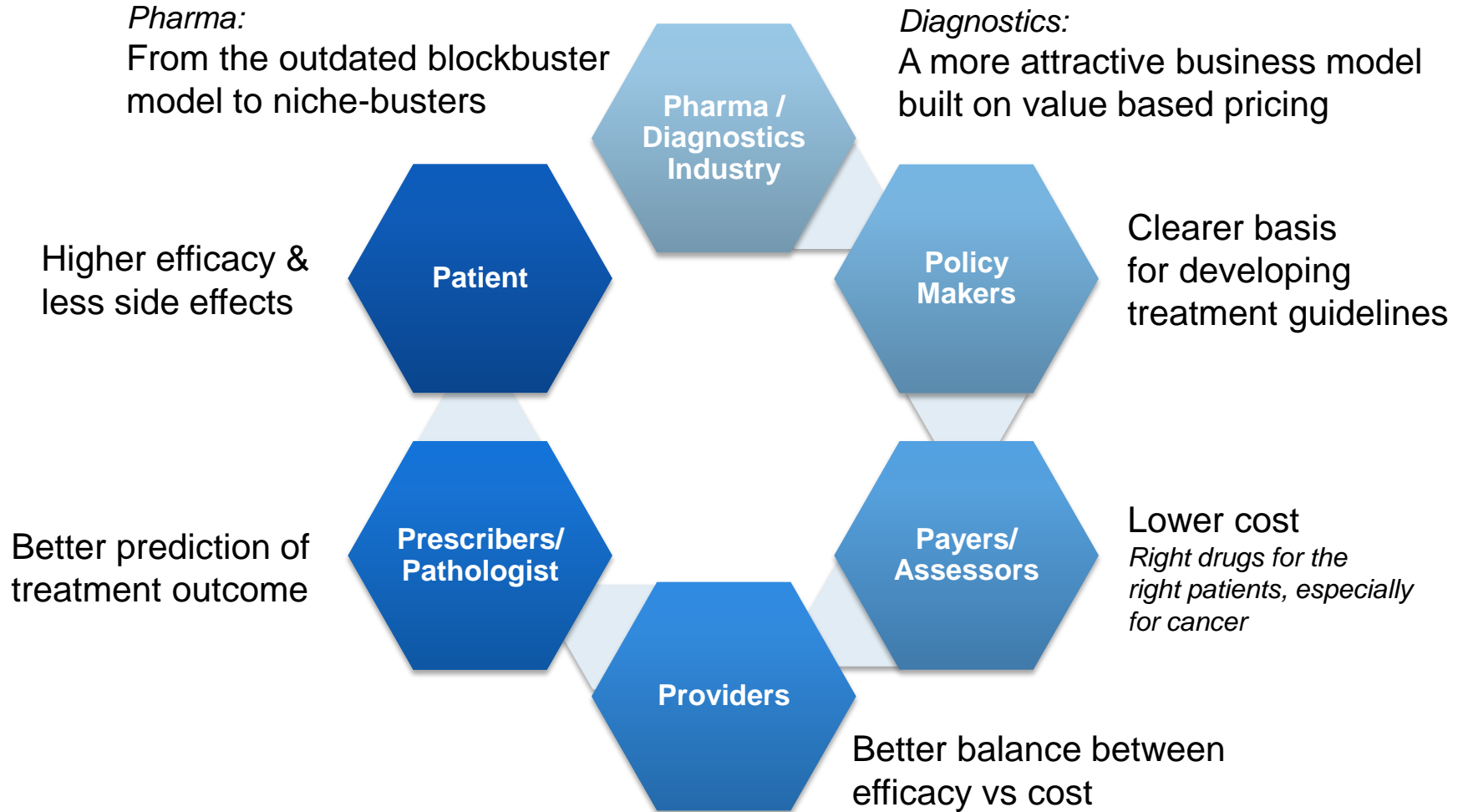
Estimated Development of Personal Medicine Core Areas



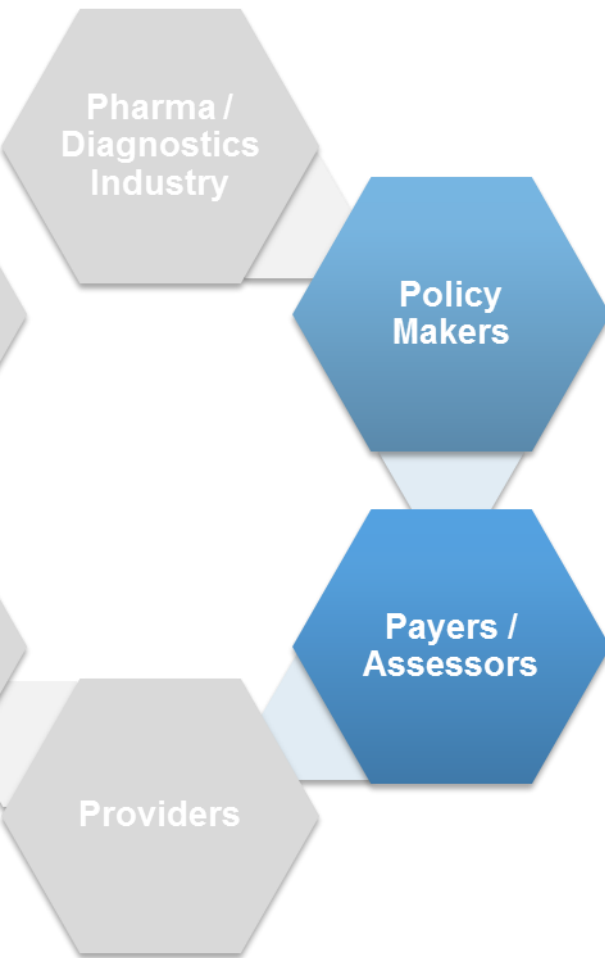
The Personalized Medicine Market Size is said to experience substantial growth in the next years - up to \$ 42bn by 2015 (MDx tests and targeted therapies) compared to \$ 24 bn. in 2009

*Esoteric Lab Services or Tests involve testing for substances (e.g. biomarkers) which is usually not performed in a "routine clinical lab". These Tests usually require specialized personnel and hardware therefore they are often outsourced from hospitals to research labs (e.g. part of big university clinics, specialized private labs etc.)
Source: PwC 2012

In principle, everyone stands to win



However, many Policy Makers and Payers/assessors are unwilling, unsure or unprepared to adapt



- Fearful that biopharmas use personalized medicine to disguise higher pricing
- Poor understanding of the difference between the prognostic vs predictive tests
- Sceptical of unfamiliar clinical data evidence used to justify economic value, yet unable to propose alternatives

The current Market Access system is therefore unable to unleash the full value of CDx



- No holistic view of Rx and CDx (undermines the whole concept of personalized medicine)
- Rx assessment mechanisms blindly applied to CDx (eg.: same data requirements)
- Technology-based reimbursement criteria may not recognize the value of CDx

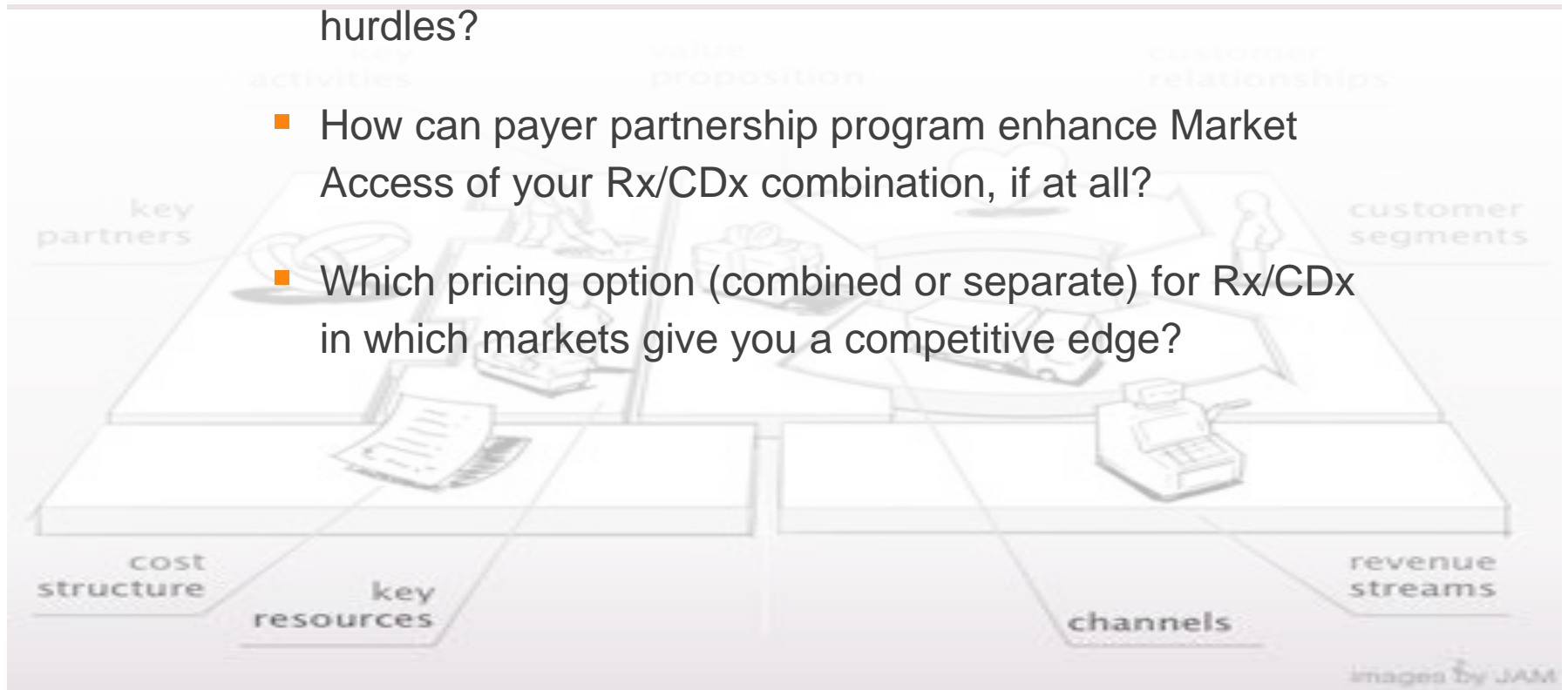
In turn, Biopharmas tread in uncharted waters in Market Access

- With different funding dynamics for CDx and Rx, how will unfunded CDx jeopardize MA of the Rx?
- Will the CDx linked to a Rx go through the reimbursement process together or separately? How will it affect the timeline?
- What new add-on funding opportunities exist for combined Rx/CDx approaches?
- How should the CDx feed into the health economic data model?
- How can we enhance Market Access by combining the early access programs of both the Rx and CDx?

Biopharmas also face new challenging questions in developing a successful business model

- What is the best “distribution model” for promoting the CDx component and overcoming any local lab capacity hurdles?

- How can payer partnership program enhance Market Access of your Rx/CDx combination, if at all?
- Which pricing option (combined or separate) for Rx/CDx in which markets give you a competitive edge?



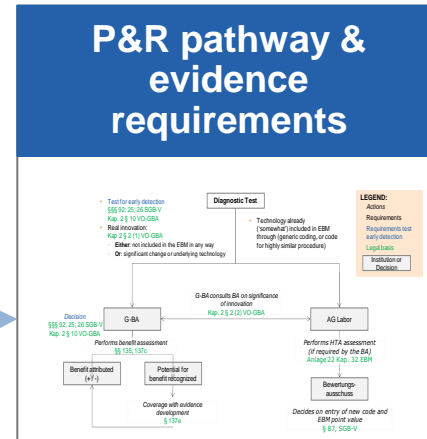
Personalized Medicine

This is where
ExecutiveInsight comes in...

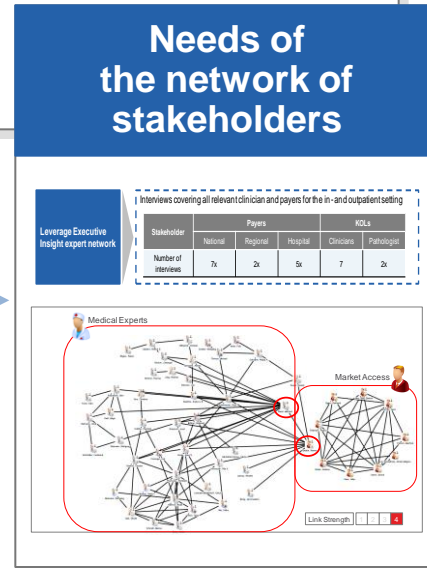
Executive Insight can undertake a rigorous review of your Pricing and Reimbursement Strategy



Enable optimal use of resources



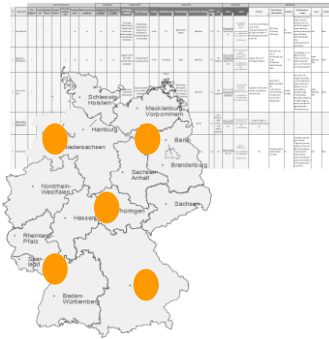
Align expectations with external and internal stakeholders



Develop win-win value propositions for key stakeholders

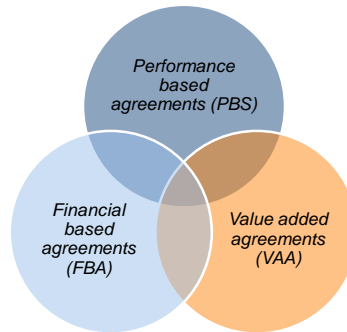
...set up a winning sustainable Business Model

Distribution mix



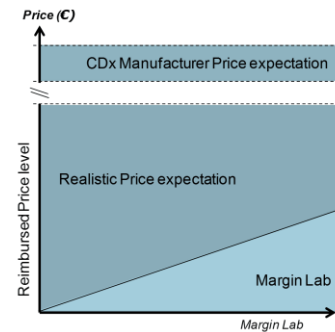
Assess feasibility of *testing clusters* for faster patient access and uptake

Payer partnership



Explore schemes which can increase chance of targeted prescription (eg: introduction of *eligibility quality assurance*)

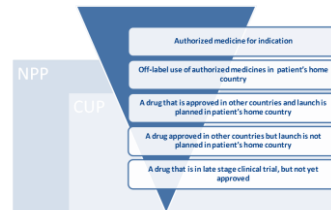
Pricing models



Propose models that reflect new customer needs and value perception (combined or separate offerings)

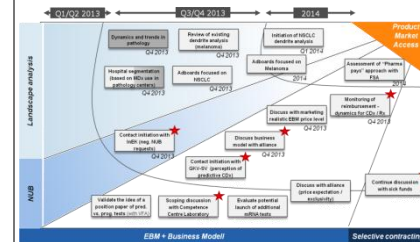
... and help you prepare efficiently for successful launch

Early access programs



Develop CUP, NPP and ROK for faster patient access and uptake

Pre-launch activity roadmap



Highlight critical success factors that ensure optimal and timely preparation for launch

We pursue the true spirit of releasing the full value of Personalized Medicine



A true personalized medicine approach

Do not use personalized medicine as a disguise for pure market expansion

Reach out to a truly eligible patients through quality management programs



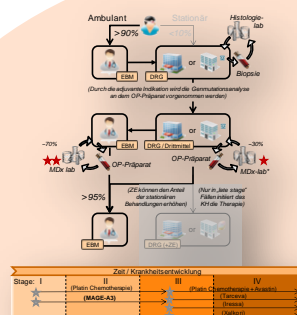
Acceleration instead of circumvention

Do not circumvent standard Market Access options to accelerate reimbursement

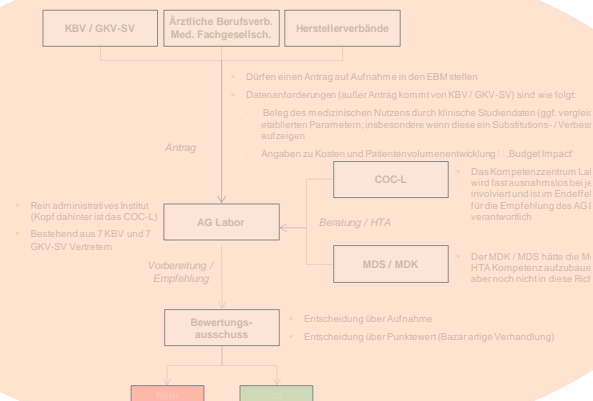
Help to shape the system so that fast access becomes possible through standard processes

We bring to your projects our unique set of expertise in Personalized Medicine

Medical experts with the in-depth understanding of patient pathways to evaluate and propose MA options



P&R country experts with experienced in P&R pathways and evidence requirements



*"You get access to a senior consulting team who have **deep competency and experience** in their respective areas."*

Global Top 3 Pharma,
Specialty Care Excellence

"...they're working with you and not just putting a lot of junior people in the projects to learn and be trained"

*"they came across as **more knowledgeable and more experienced**"*

We take a front seat in shaping Personalized Medicine policies

Publish articles on early access programs and payer partnerships programs ('innovative contracting')



INNOVATIVE CONTRACTING: A REVIEW

Executive Insight Publication, July 2012



Member of standing panel of 10 payers and 5 policy makers from major European markets, competent in all questions related to Personalized Medicine

Track Record

- Developed **pricing models** for 5 major Rx/CDx solutions
- Accompanied **PPP's** from initial discussions between Payers and Pharma to successful PPP implementation
- Established **test cluster pilots** successfully in major EU markets

Finally, our client-partners seem to like the way we work with them

Uncovering your true needs by embedding ourselves in your team

Open Collaboration

- We **challenge** constructively
- Before going into new solutions, we leverage and **maximize our customer internal knowledge**, expertise and competences

*“they **made my priorities their priorities**,
they really did”*

*“the **collaboration and flexibility**
is a real strengths of theirs”*

*“they are very good at **being**
a critical friend”*

*“merging within the team culture and
acting as a part of the team”*

*they do generate a **chemistry match**
between themselves and the customer*

Creative Pragmatism

- We develop an approach based on our experience with **what works and what doesn't**
- We provide **actionable recommendations that remain valid** after we leave

*“they have a pragmatic view of
how things actually get
implemented and executed once
you develop the strategy “*

*“they have just **delivered very**
strong results consistently”*

*“**fantastic brains and innovation**
that they have “*

If you want support in defining your plans and can identify with our thinking, contact us

Your contact persons:

Andrea Sobrio

Mobile: +41 79 456 87 16

a.sobrio@executiveinsight.ch



Klarissa Hoday

Mobile: +41 79 446 93 79

k.hodayl@executiveinsight.ch



Company address:

Executive Insight AG
Metallstrasse 9
CH-6304 Zug

Tel. +41 (0)41 710 71 63
www.executiveinsight.ch
info@executiveinsight.ch



Appendices – About Executive Insight

Our place in the industry – consistent thought leadership

Move from block busters to niche products

Increasingly complex and intertwined environment

Emerging power of payers

Value expectations along the whole patient pathway

Our flagship methodologies provided timely answers to the most challenging issues

2000

2004

2007

2011

Regionally based Business Model for Narrow indication products

Network Based Commercialization

Payer Engagement and Contracting

Beyond the Pill



Organisational Polygamy
Pharmaceutical Executive



Networked Healthcare Series
Journal of Medical Marketing



Innovative Contracting
Pharmaceutical Executive



Beyond The Pill: More than Just a Slogan
Farmafocus

Check out our website for all related publication and TL on the topics www.executiveinsight.ch/publications

Our team - a unique mix of industry, consulting and medical backgrounds

Interdisciplinary team of 20 professionals

Cover the EU big 5 languages (English, German, French, Italian, Spanish) and beyond (e.g. Chinese)

Meet some of our experts here: (see the entire team online)

CONSULTING EXPERTS



Andrea Sobrio

- > 10 years healthcare consulting experience
- Focus: Market Access, Commercial Models



Meike Wenzel

- > 10 years healthcare consulting experience
- Focus: Sales, Customer & Market Insights



Marc Pesse

- > 10 years healthcare consulting experience
- Focus: Network Mapping & Mgt.

INDUSTRY EXPERTS



Eric Janvier

- > 17 years pharma industry experience
- Finance & Business Development



Francesca Boggio

- > 3 years medical device industry
- > 8 years consulting
- Strategic marketing



Wendy van der Lubbe

- > 7 years pharma industry experience
- Product Mgt. & Medical Affairs

MEDICAL EXPERTS



Suzan Esslinger

- Theoretical medicine, PhD in Molecular Biology
- Expert for Medical Info., Education & Regulatory



Sandra Schoenes

- Medical doctor
- General and orthopaedic surgeon



Dr. Morteza Yazdani

- PhD in Neuroscience
- Diploma in Biotechnology

Our services



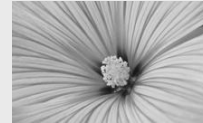
MARKET ACCESS

We support our clients in in-depth understanding of the HC environment and the design of solutions that meet payers objectives and needs



REGULATORY

We support you with building a regulatory strategy to successfully accompany your product through its entire life cycle



MARKETING

We support our clients in developing a compelling value proposition that goes beyond the product to ensure “value beyond the pill”



SALES

We help you find the right balance between adding true value to customer interactions and realising efficiencies



CUSTOMER & MARKET INSIGHTS

We offer innovative methods for generating fresh customer insights

Our clients

