



# Best-in-class Pharma Brand Plans

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## Essential Recommendations

*“Transforming Brand Planning from an exercise in style to a powerful performance enabler”*

**The purpose of Brand Plans is to allocate the right resources  
to reach the performance objective set, in an effective and efficient way**

**Key principles**

- Smart Pharma consultants have helped 40 pharma companies develop brand plans for more than 85 brands across 20 different therapeutic areas:

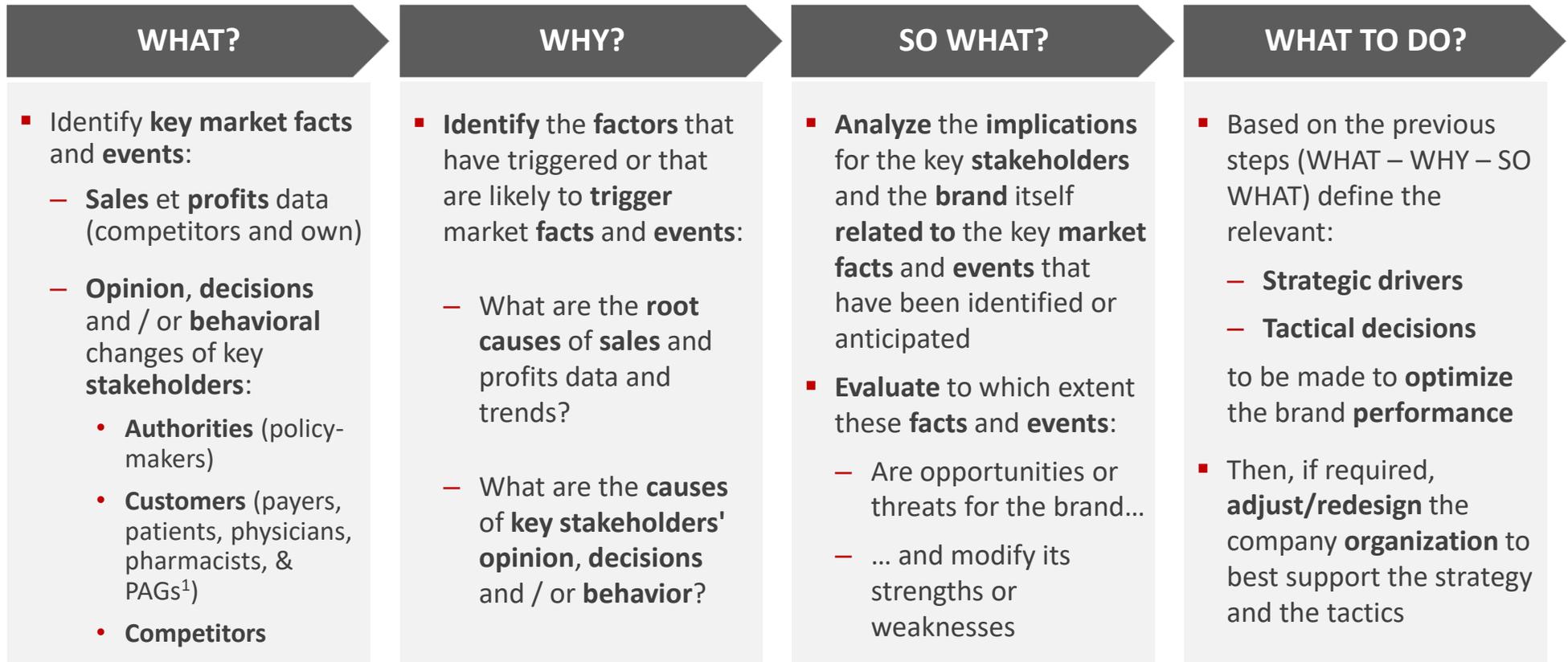
- |                     |                            |                   |                    |
|---------------------|----------------------------|-------------------|--------------------|
| 1. Allergy          | 6. Gynecology              | 11. Neurology     | 16. Psychiatry     |
| 2. Cardiology       | 7. Hematology              | 12. Obesity       | 17. Rare diseases  |
| 3. Dermatology      | 8. Immunology              | 13. Ophthalmology | 18. Rheumatology   |
| 4. Diabetology      | 9. Infectiology / Virology | 14. Oncology      | 19. Urology        |
| 5. Gastroenterology | 10. Nephrology             | 15. Pulmonology   | 20. Women's health |

- Over the years, this experience has enabled us to develop recommendations including a rigorous method and practical tools to craft best-in-class Pharma Brand Plans

*“The brand plan: too much time spent for what you get, but not enough for what you should get”*

The 4 Ws approach strengthens the relevance and thus the impact of decisions made by ensuring consistency from observation (What) to action (What to do) via analysis (Why and so What)

The 4 Ws approach

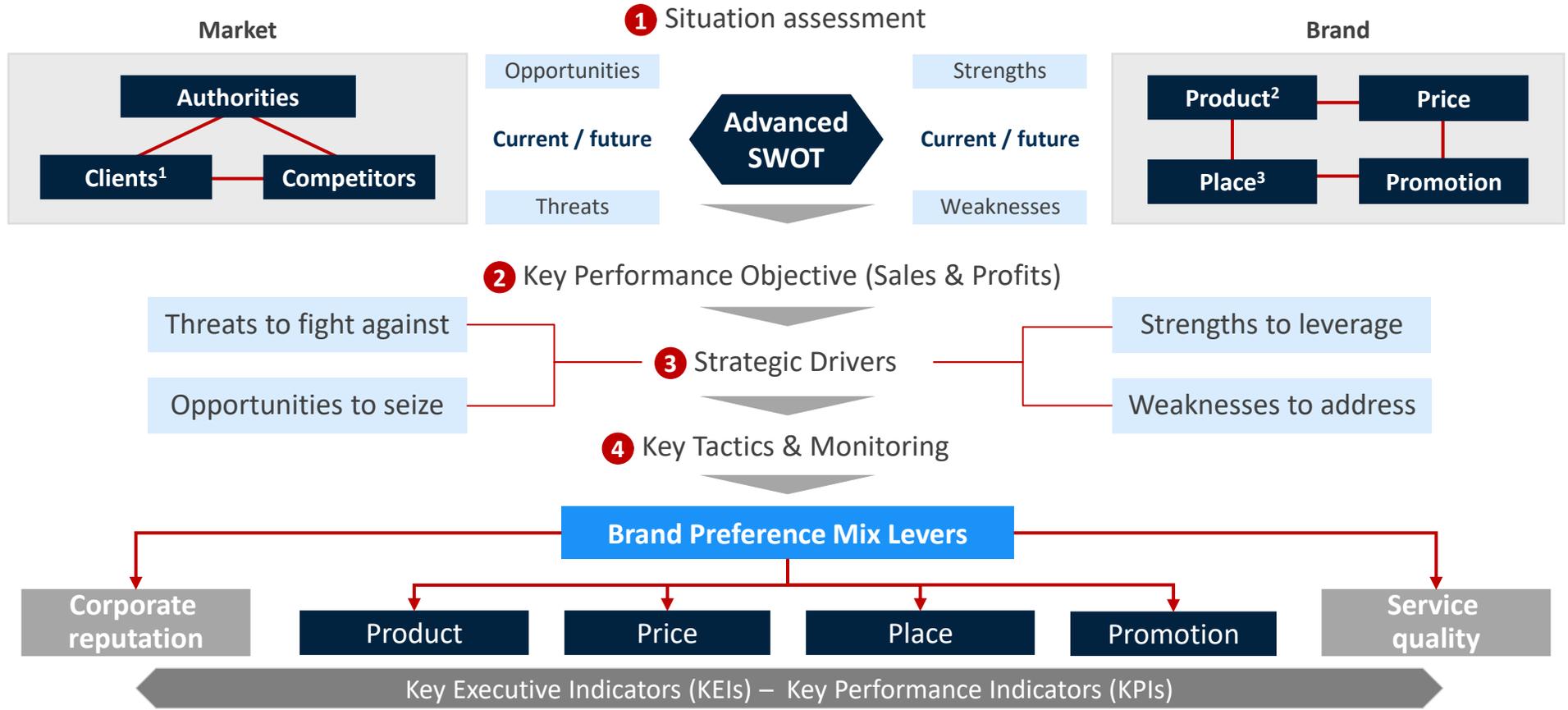


Sources: Smart Pharma Consulting

<sup>1</sup>Patient Advocacy Groups

We propose a four-step thinking process to craft strategic drivers that will enable to achieve Brand Key Performance Objective through the activation of its relevant Preference Mix levers

Thinking process



Sources: Smart Pharma Consulting

<sup>1</sup> Including payers, healthcare professionals, buyers, patients, patient advocacy groups, etc. –

<sup>2</sup> Accounts for clinical efficacy, acceptability, convenience, etc. – <sup>3</sup> Stands for distribution

The situation analysis should focus on identifying and analyzing current and future key market events from which implications for the brand will be deduced

**1 Situation assessment (1/2)**



**Our recommendations**

1. Carry out an in-depth and rigorous analysis of authorities, clients and competitors' opinion and behavior to:
  - Delineate the relevant market the brand competes in
  - Estimate the market trends, in terms of sales & profits
  - Evaluate the current and future competitive intensity
2. Gather only “need to have”, reliable quantitative and qualitative data (the WHAT)
3. Understand the causes that drive these data (the WHY)
4. Draw the implications (the so WHAT) for the brand from the WHAT and the WHY



- An in-depth market knowledge and understanding (insights) enables to identify and evaluate:
  - Major market opportunities and threats
  - Brand strengths and weaknesses

The “Advanced SWOT” developed by Smart Pharma Consulting helps carry out a more specific and relevant assessment of the market situation and of the brand competitive position

**1** Situation assessment (2/2)

Our recommendations

Advanced SWOT analytical tool

Market Opportunities	RI <sup>1</sup>	Market Threats	RI
<ul style="list-style-type: none"> <li>▪ Authorities<sup>2</sup></li> <li>▪ Customers<sup>3</sup></li> <li>▪ Competitors</li> </ul>		<ul style="list-style-type: none"> <li>▪ Authorities</li> <li>▪ Customers</li> <li>▪ Competitors</li> </ul>	
Brand Strengths	RI	Brand Weaknesses	RI
<ul style="list-style-type: none"> <li>▪ Product (4 Ps<sup>4</sup>)</li> <li>▪ Services</li> <li>▪ Corporate reputation</li> </ul>		<ul style="list-style-type: none"> <li>▪ Product (4 Ps)</li> <li>▪ Services</li> <li>▪ Corporate reputation</li> </ul>	

*The Advanced SWOT analysis represents a structured summary of the situation analysis from which key strategic drivers are drawn*

- To facilitate the definition of the brand strategic drivers, we recommend to use the “Advanced SWOT” which structures:
  - Market opportunities and threats into stakeholders’ opinion and behavior
  - Brand strengths and weaknesses into the product, the associated services and the reputation of the marketing company...
  - ... by comparison with its major competitors
- The items listed in each of the four quadrants of the SWOT should be evaluated according to their relative importance (RI) by using a five-point scale

*“If the SWOT is named the Silly Way Of Thinking by its detractors...  
... the Advanced SWOT has shown to be a Smart Way Of Thinking”*

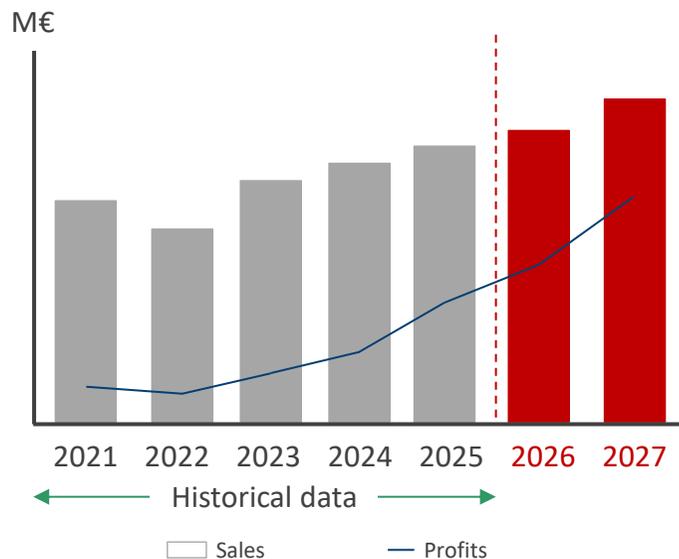
Sources: Smart Pharma Consulting

<sup>1</sup> Relative Importance of each item, rated from 5, high importance to 1, low importance – <sup>2</sup> Policy makers – <sup>3</sup> Payers, physicians, pharmacists, patients, patient advocacy groups – <sup>4</sup> Product features, price, distribution, promotion

Sales and profits objectives (forecasts) should be set based on the brand and its market historical trends (projection), adjusted according to the likely occurrence of market and brand major events

## 2 Key Performance Objective (Sales & Profits)

### Sales & Profits Forecasts



### Our recommendations

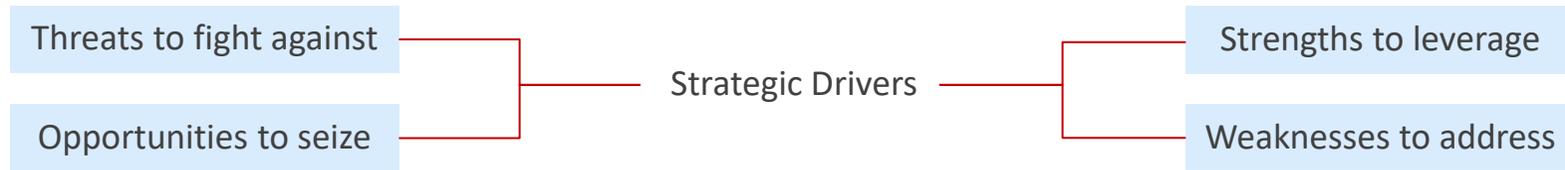
- The robustness of Key Performance Objective will rely on:
  - Market definition
  - Historical assessment of the brand and its market
  - Anticipation of future market and brand events...
  - ... as summarized in the “Advanced SWOT” analysis
- To do so, relevant and reliable market and brand data should be gathered to:
  1. Calculate sales and profits projections based on historical trends through regression analysis<sup>1</sup>
  2. Calculate sales and profits forecasts by adjusting trends based on market and brand scenarios building through different methods<sup>2</sup>
- The final setting of the Key Performance Objective should consider the impact of key tactics (medico-marketing and sales investments) that will be implemented

*In the absence of market data and/or for new brands to be launched, a patient-based model can be envisaged to forecast sales and profits. Such a model, based on epidemiological data (prevalence and incidence), diagnosis and treatment rates*

**“Accurate forecasting is 70% of thought, 20% of techniques and 10% of inspiration”**

The preferred strategic drivers are those which are the most likely to impact the brand so that to achieve the Key Performance Objective considering the different market and company constraints

### 3 Strategic Imperatives



#### The Brand Strategy Card

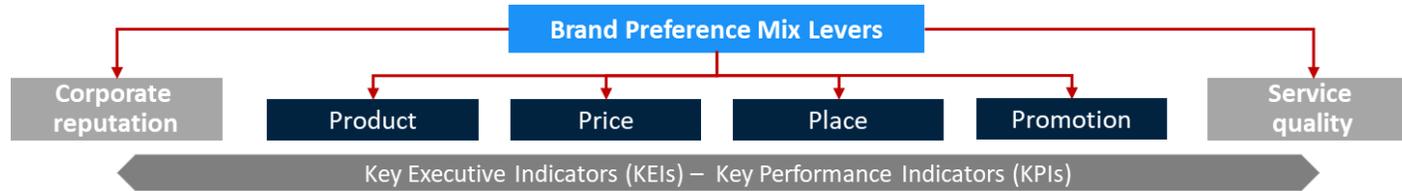


#### Our recommendations

- The strategic drivers are the priorities on which the company should concentrate its resources and capabilities to achieve the Brand Key performance Objective
- The selection of the strategic drivers will be based on:
  - The outcome of the “Advanced SWOT” analysis
  - Their feasibility and likely impact on performance
- The recommended Brand Strategy Card helps ensure the consistency between:
  - Key Performance Objective
  - Strategic Drivers
  - Key Tactics

Each tactic should be carefully selected to best support the strategic drivers to enhance the probability to achieve the Brand Key Performance Objective

**4** Key Tactics & Monitoring (1/2)



Our recommendations

Table of key tactics related to the strategic drivers

Strategic Driver		Department <sup>1</sup>			
Tactic	Target	Objective	Timing	Responsible	Budget

*For each tactic, precise the target concerned, set a precise objective, plan it, name a responsible and estimate a budget*

- Key tactics being the operational expression of strategic drivers, they will contribute to achieve the Brand Key Performance Objective by reinforcing the determinants of the Brand Preference Mix levers, that are:
  - The corporate reputation of the marketing company
  - The brand perception, through its 4Ps
  - The service quality
- Before selecting a tactic:
  - Its impact and feasibility should be evaluated if it has already been implemented during the previous year
  - It may be needed to test the idea with a specific tool<sup>2</sup>

Sources: Smart Pharma Consulting

<sup>1</sup> Market access, medical, marketing, sales, etc. If the medical affairs department does not promote brands, it should contribute to optimize the use of brands in the best interest of the patients, by generating and disseminating medical data to healthcare professionals – <sup>2</sup> See the one shown in our position paper “ Excellence in Execution” p. 1840 – <https://smart-pharma.com/wp-content/uploads/2026/01/Smart-Pharma-2016-2025-Collection.pdf>

KEIs<sup>1</sup> and KPIs<sup>2</sup> are both essential, the first type of indicators measuring the quality of execution and the second one the degree of objective achievement

**4** Key Tactics & Monitoring (2/2)

Table of key tactics with monitoring indicators

Strategic Driver		Department					
Tactic	Target	Objective	Timing	Responsible	Budget	KEIs <sup>1</sup>	KPIs <sup>2</sup>

Examples of monitoring indicators

Quantitative	
<ul style="list-style-type: none"> <li>% of customer covered</li> <li># of interactions with customers</li> <li># of projects carried out</li> <li>Resources allocated per hospital</li> </ul>	<ul style="list-style-type: none"> <li># of new customers</li> <li># of prescriptions per customer</li> <li>Sales dynamics in % and in €</li> <li>Return on investment</li> </ul>
<b>KEIs</b>	<b>KPIs</b>
Qualitative	
<ul style="list-style-type: none"> <li>Level of market insights</li> <li>Quality of interactions w/ HCPs</li> <li>Quality of services delivered</li> <li>Proper management of projects</li> </ul>	<ul style="list-style-type: none"> <li>Brand Preference Mix Index</li> <li>Corporate reputation improvement</li> <li>Perceived quality of products</li> <li>Perceived value of services</li> </ul>

Our recommendations

- Key Execution Indicators (KEIs) to measure the quality of execution of tactics
- Key Performance Indicators (KPIs) to measure the business outcome of tactics
- By measuring the quality of execution and the impact of tactics, it is possible to adjust the brand plans (during the year or from the previous year) to make them more efficient and effective

*“KEIs check that you are on the right track and KPIs check that you arrive at destination”*

Sources: Smart Pharma Consulting

<sup>1</sup> Key Execution Indicators – <sup>2</sup> Key Performance Indicators

## Smart Pharma Service Offering

### Consulting Services

- Smart Pharma Consulting is well-known for its ability to help brand teams build robust brand plans
- To date, Smart Pharma consultants have helped **40 pharma** companies develop strategic and tactical plans for more than **85 brands** across **20** different **therapeutic areas**
- Thus, we can bring our **support** to address the following issues:
  - **Which market analyses** should be carried out?
  - How to define **key success factors** and the corresponding **brand challenges** with the help of the “**Advanced SWOT**”?
  - How to **develop** market and brand **scenarios**?
  - How to **set** the brand **performance objective**?
  - How to **select** the **strategic drivers** to achieve the brand performance objective?
  - How to support the strategic drivers by **tactical initiatives** likely to **reinforce** the **preference** of **stakeholders for the brand**?
  - How to **anticipate** the **impact** of **future investment** options on the brand performance?
  - How to **monitor the quality of execution** and the **impact** of **investment decisions**?

### Training Program

#### Example of a One-Day Program<sup>1</sup>

8:30	Introduction to the program
8:40	Definitions, concepts, methods, tools related to Brand Plans
9:00	<b>Module 1:</b> Situation analysis Market definition and dynamics Stakeholders' opinion and behavioral analysis
10:30	<i>Break</i>
10:50	Advanced SWOT analysis
12:00	<b>Module 2:</b> Sales forecasting
13:00	<i>Lunch</i>
14:00	<b>Module 3:</b> Strategy crafting
15:00	<b>Module 4:</b> Tactics selection
16:00	<i>Break</i>
16:20	<b>Module 5:</b> Tactics monitoring
17:20	Conclusion and key takeaways
17:30	End of the program

#### Target Audience

- Collaborators involved in supporting the brands (e.g., from the medical, marketing, commercial, market research, strategic departments), whatever their level of responsibility and seniority

Consulting firm dedicated to the pharmaceutical sector operating in the complementary domains of strategy, management and organization

### Best-in-class Series

- This series intends to provide practical tools and recommendations to enhance the efficacy and efficiency of the most important activities or processes in place within pharma companies
- Our tools and recommendations are based on both:
  - Our consulting experience in the pharma sector
  - Our research for innovative, pragmatic and useful solutions
- Each issue of this new series has been designed to be read in 15 to 20 minutes and not to exceed 20 pages

### Best-in-class **Pharma Brand Plans**

#### Essential **Recommendations**

- Brand Plans are often of limited use due to a weak building process, lack of market insights and insufficient involvement of brand teams
- This position paper provides essential recommendations based on academic principles, Smart Pharma Consulting method, tools and long-term experience in providing support to brand teams
- Best-in-class Pharma Brand Plans enable to boost effectively and efficiently brand performance

*“High-Performance Pharma Brand Plans require method, rigor and pragmatism”*

### Smart Pharma Consulting Editions



- Besides our consulting activities which take 85% of our time, we are strongly engaged in sharing our knowledge and thoughts through:
  - Our teaching activities in advanced masters
  - Training activities for pharma executives
  - The publication of articles, booklets, books and expert reports
- Our publications can be downloaded from our website:
  - 43 articles
  - 79 position papers covering the following topics:
    1. Market Insights
    2. Strategy
    3. Market Access
    4. Medical Affairs
    5. Marketing
    6. Sales Force Effectiveness
    7. Management & Trainings
- Our research activities in pharma business management and our consulting activities have shown to be highly synergistic
- We remain at your disposal to carry out consulting projects or training seminars to help you improve your operations

Best regards

Jean-Michel Peny