



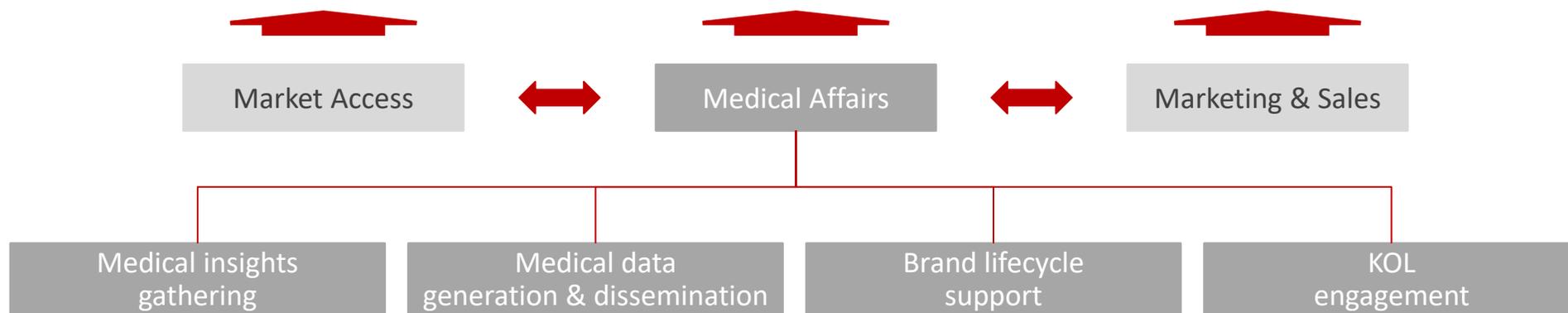
Best-in-class Medical Brand Plans

Recommendations for Affiliates

Medical Affairs activities should contribute to optimize the use of pharma companies' brands by HCPs in the best interest of patients

Introduction

Shared objective: *"Brand use optimization in the best interest of patients"*



- Medical Affairs play a central role in supporting internal company stakeholders¹ to fulfill the needs of external ones² on medical aspects re.:
 - Disease management
 - Specific indications
 - Product features

- From a product perspective, it is essential that Medical Affairs, Market Access and Marketing & Sales departments:
 - Share the same objective
 - Craft a common strategy to meet this objective
 - Coordinate their activities in their field of expertise, while complying with regulations

The purpose of medical brand plans, at affiliate level, is to allocate the right resources to reach the specific medical objective set, in an effective and efficient manner

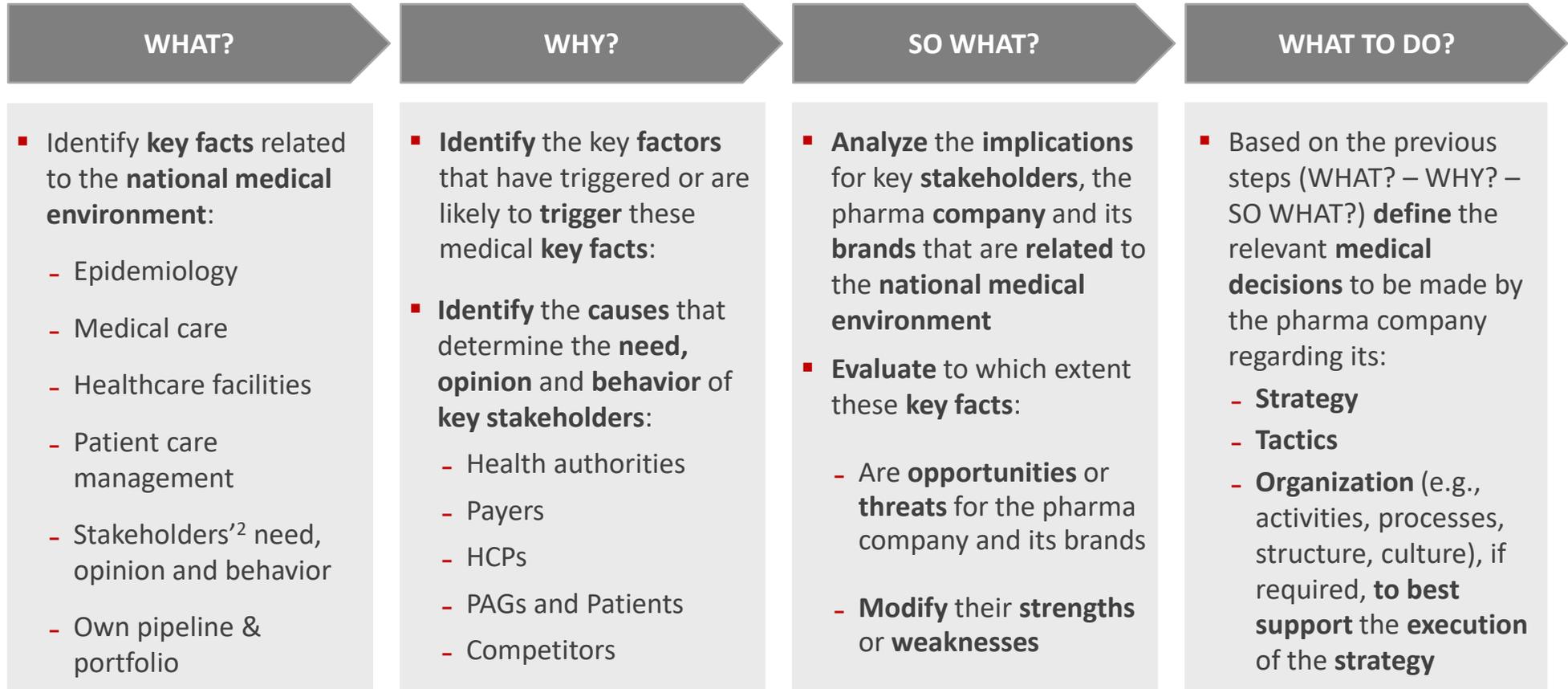
Why crafting a medical brand plan?

- To **prioritize** the medical **activities** to be carried out, **based on**:
 - The analysis of the **medical environment**
(e.g., epidemiology, medical care, patient care, healthcare facilities)
 - The **need, opinion** and **behavior** of **health authorities, payers, HCPs, patients** and **competitors**
(e.g., RWE¹ data generation, medico-economic evaluation of a product, scientific and medical data dissemination)
 - The **medical objective** of the **company**
(e.g., optimize the prescription of a brand, reinforce its proof of efficacy, update medical guidelines)
- To **organize** the **execution** of these **medical activities** in **synergy with other departments** of the pharma company
- To **monitor** the quality of **execution** and the **impact** of these **activities**

PURPOSE →

We suggest to adopt the 4 Ws¹ framework to reinforce the relevance and consistency between the national medical situation, medical objective, strategic imperatives and corresponding tactics

How to craft a medical brand plan?



Sources: Smart Pharma Consulting

¹ What? – Why? – so What? – What to do? – ² Authorities, payers, HCPs, PAGs, patients, competitors

This four-step thinking process enables to craft the medical strategic drivers to achieve the key medical objective set through the activation of the brand optimization levers

Medical brand planning process



The medical situation assessment should focus on identifying and analyzing current and future key medical environment features from which implications for the brand will be deduced

1 Medical situation assessment (1/3)



Our recommendations

1. Carry out an **in-depth** and **rigorous analysis** of the **medical environment** related to the indications of the brand:
 - Epidemiology
 - Medical care – patient care management / patient journey
 - Healthcare facilities
 - Stakeholders’ need, opinion and behavior (incl. competitors’ position and own pipeline and portfolio)
2. Gather **reliable quantitative** and **qualitative essential data** (the WHAT)
3. Understand the **causes** that **drive these data** (the WHY)
4. Draw the **medical implications** (the so WHAT) for the **brand** from the WHAT and the WHY



- **In-depth** medical environment knowledge and understanding (**insights**) **enable** to **identify** and **evaluate**:
 - Major **medical** environment **opportunities** and **threats** for the brand
 - **Brand medical strengths** and **weaknesses** vs. therapeutic alternatives

The following chart is an enabling tool to identify and analyze the key facts and figures relative to the medical environment, and from which implications for the brand can be drawn

1 Medical situation assessment (2/3)

Medical Environment Analysis Chart

Illustrative

Key Facts & Figures – WHAT?		Driving Factors – WHY?	Implications – So WHAT?
Epidemiology (Prevalence – Incidence)			
Medical care (Diagnosis – Treatment – Guidelines)			
Patient care management (Patient journey)			
Healthcare facilities (Institutions, CoE ¹ , Networks)			
Stakeholders' opinion & behavior	Health authorities		
	Customer group A (HCPs ²)		
	Customer group B (PAGs)		
	Competitors		
Own pipeline & portfolio			

Sources: Smart Pharma Consulting

¹ Center of Excellence – ² Including learned societies, cooperator groups, medical experts

The Advanced SWOT helps medical teams carry out a more specific and relevant assessment of the medical environment and the medical position of the brand

1 Medical situation assessment (3/3)

Our recommendations

Medical Advanced SWOT

Medical Opportunities	RI ¹	Medical Threats	RI
<ol style="list-style-type: none"> 1. Epidemiology 2. Medical care 3. Patient care 4. Healthcare facilities 5. Stakeholders 		<ol style="list-style-type: none"> 1. Epidemiology 2. Medical care 3. Patient care 4. Healthcare facilities 5. Stakeholders 	
Brand Strengths	RI	Brand Weaknesses	RI
<ul style="list-style-type: none"> ▪ Product features ▪ Medical services ▪ Corporate reputation 		<ul style="list-style-type: none"> ▪ Product features ▪ Medical services ▪ Corporate reputation 	

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

- To **facilitate** the **crafting** of the **medical strategic drivers**, we recommend to use the **Advanced SWOT** which **structures**:
 - Medical environment **opportunities** and **threats** through its **five key determinants**²
 - Brand medical **strengths** and **weaknesses** through:
 - The **product features** (efficacy, indications, clinical and real-word data, safety profile, convenience)
 - The associated **medical services** proposed
 - The **corporate reputation** of the company...
 - ... **by comparison** with major **therapeutic alternatives**
- 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**

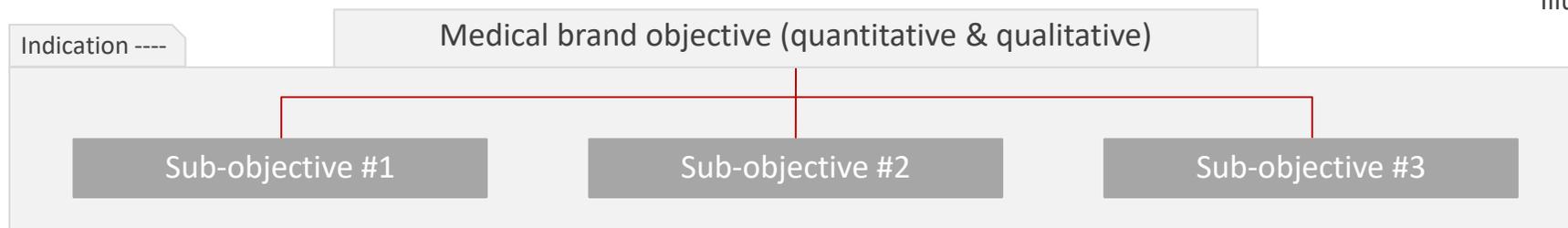
*“If the SWOT is named the Silly Way Of Thinking by its detractors...
... the Advanced SWOT has shown to be a Smart Way Of Thinking”*

The medical brand objective, which can be split into several sub-objectives, should be set by indication and articulated to drive appropriate and sustainable adoption by HCPs

2 Key medical brand objective

Our recommendations

Illustrative



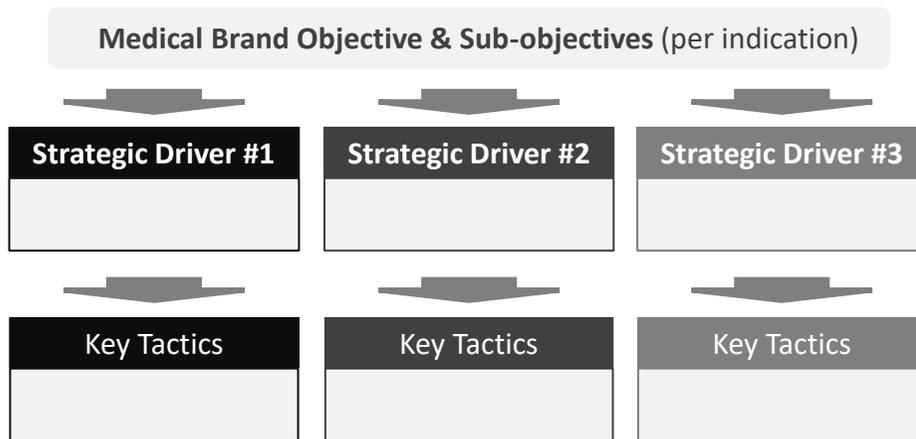
- Medical brand **objective** and **sub-objectives** are expressed in **quantitative** and **qualitative** terms and **depend on**:
 - The **medical environment** analysis
 - The assessment of the **brand per indication**
 - The **future events** re. the medical environment and the brand, as summarized in the Advanced SWOT analysis
- **Relevant** and **reliable** medical environment and brand **data** should be **gathered** to **set** the **medical brand objective** and **sub-objectives**
- The final **setting** of the **objective** and **sub-objectives** should **consider** the **likely impact** of the key **tactics** to implement
- Medical brand **objective** and **sub-objectives** should be **set by indication**
- The following **sub-objectives** are the **most common**:
 - Support the **market access** (e.g., labelling expansion)
 - Establish a strong **scientific knowledge, understanding** and **appropriate adoption** by HCPs (especially at launch phase)
 - Generate high-quality **real-world evidence data**
 - Support **guideline inclusion** and clinical **practice integration**
 - Identify and address **unmet medical needs**
 - Optimize **patient identification** and **treatment pathway**
 - Strengthen **partnerships** with the scientific community

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 Medical strategic drivers (1/2)

Our recommendations

The Medical Brand Card



- To achieve objective and sub-objectives (per indication), the **strategic drivers** can be articulated around these **4 pillars**:
 1. **Medical insights gathering** re. unmet needs to prioritize the brand medical development
 2. **Data generation¹ and dissemination²** to help HCPs optimize disease management, patient care and brand usage^{3,4}
 3. **Brand lifecycle support** by raising interest, building awareness, positioning the brand, educating on clinical evidence and appropriate use, supporting market access and medico-marketing departments of the company, etc.
 4. **KOL engagement** through participation to highly-valued scientific meetings, advisory boards, congresses, etc.
- The **preferred strategic drivers** are the most efficient and effective to achieve the **objective** and **sub-objectives**
- **Consistency** between the **objective / sub-objectives**, the **strategic drivers** and the **key tactics** is **imperative**

- The **strategic drivers** that are derived from the Advanced SWOT analysis can be a:
 - Medical environment **opportunity to seize**
 - Medical environment **threat to fight against**
 - Brand **strength to capitalize on**, and/or
 - Brand **weakness to address**

Sources: Smart Pharma Consulting

¹ Clinical studies, RWE studies, registries, ISSs (Investigators-Initiated Studies) – ² Posters, abstracts and lectures in congresses, articles in journals, medical meetings at national, regional, local and/or institution levels (in-person or remotely), CME (Continuing Medical Education) support – ³ In accordance with the labelling and the guidelines – ⁴ Including medical education of pharma companies' internal collaborators

The Medical Brand Card facilitates the alignment of objective and sub-objectives, medical strategic drivers and corresponding tactics, while ensuring complementarity with other functions¹

3 Medical strategic drivers (2/2)

Medical Brand Card

Illustrative

Indication ----			
Medical Brand Objective & Sub-objectives			
Quantitative & Qualitative objectives & sub-objectives			
Strategic driver #1	Strategic driver #2	Strategic driver #3	Strategic driver #4
Supporting tactics	Supporting tactics	Supporting tactics	Supporting tactics

Complementarity & coordination with other key functions¹ of the pharma company

Sources: Smart Pharma Consulting

¹ Including market access, marketing & sales, regulatory affairs, pharmacovigilance, clinical development, etc.

Each medical tactic should be carefully selected to best support the medical strategic drivers and carefully planned to ensure a high-quality of execution

4 Medical tactics & monitoring (1/3)

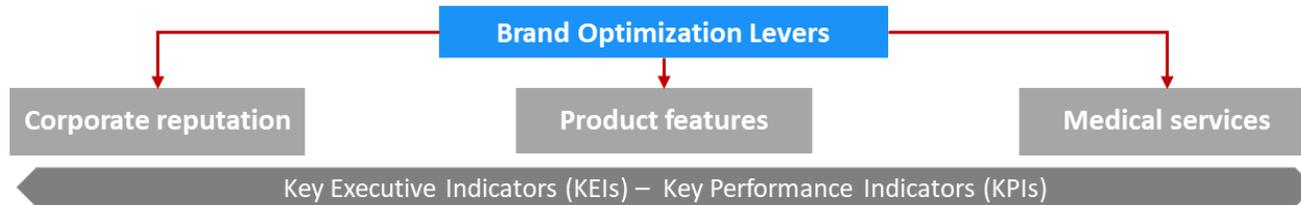


Table of key tactics related to a strategic drivers

Strategic Driver <input type="text"/>					
Tactic / Activity	Objective	Target	Timing	Responsible	Budget

For each tactic, set a specific objective, define the target audience, plan the actions, assign a responsible person and estimate a budget

Our recommendations

- Key **tactics** being the operational expression of strategic drivers, they will **contribute** to **achieve** the medical brand **objective** and **sub-objectives** by **reinforcing** the determinants of the **Brand Optimization Levers**, that are:
 - The **corporate reputation** of the pharma company
 - The perception of the brand **medical features**
 - The perception and usefulness of the **medical services**
- Before **selecting a tactic**:
 - Its **impact** and **feasibility** should be **evaluated** if it has already been implemented
 - It may be needed to **test** the **idea** with a specific tool¹

Sources: Smart Pharma Consulting

¹ 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>

KEIs¹ and KPIs² are both essential, the first type of indicators measuring the quality of execution and the second one the degree of objective achievement

4 Medical tactics & monitoring (2/3)

Table of key tactics with monitoring indicators

Strategic Driver							
Tactic / Activity	Objective	Target	Timing	Responsible	Budget	KEIs ¹	KPIs ²

Examples of monitoring indicators

Quantitative	
<ul style="list-style-type: none"> # of KOL engagements # of ad boards completed # of MSL calls Resources spent (man-days, €) ... <p style="text-align: center;">KEIs</p>	<ul style="list-style-type: none"> Contribution to medical guidelines evolution Contribution to brand market access through data generation ... <p style="text-align: center;">KPIs</p>
Qualitative	
<ul style="list-style-type: none"> Quality of ad boards (internal / external perceptions) Relationship quality with KOLs (survey-based) ... <p style="text-align: center;">KEIs</p>	<ul style="list-style-type: none"> Perceived quality of the brand Perceived value of medical services Level of corporate reputation ... <p style="text-align: center;">KPIs</p>

Our recommendations

- Select a limited number of metrics to measure:
 - The quality of execution of tactics with **KEIs**
 - The business outcome of tactics with **KPIs**
- By **measuring the quality of execution** and the **impact** of medical tactics, it is possible **to adjust the medical brand plan** (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

¹ Key Execution Indicators – ² Key Performance Indicators

This proposed Activity Card includes, on one page, a planning section and a monitoring section for each medical tactic

4 Medical tactics & monitoring (3/3)

Medical Activity Card

Illustrative

<ul style="list-style-type: none"> Medical strategic drivers: precise the driver the tactic is supposed to support Medical tactical objective: define the specific objective of the tactic Description: describe briefly the tactic 		<ul style="list-style-type: none"> Stakeholder types: internal, external (e.g., HCPs, payers, PAGs) Number of stakeholders: 		<p>Importance M – H*</p>	
Planning	Actions		Timing	Owner	FTE / OpEx
Key activities corresponding to the medical tactic	1.				•
Monitoring	Quantitative / qualitative metrics	Indicator objective	Indicator achievement	Key implications / Comments	
Key Execution Indicators (Quality of execution)	•	•	•	•	
Key Performance Indicators (Impact of the activities)	•	•	•	•	

Sources: Smart Pharma Consulting

* M = Medium – H = High

Smart Pharma Service Offering

Consulting Services

- Smart Pharma Consulting is well-known for its ability to help access, medico-marketing and sales 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 medical environment analyses** should be carried out?
 - How to define **key success factors** and the corresponding **medical challenges** with the help of the **Advanced SWOT**?
 - How to **develop** medical environment and brand **scenarios**?
 - How to **set** the medical brand **objective** and **sub-objectives**?
 - How to **select** the **strategic drivers** to achieve the medical brand objective and sub-objectives?
 - How to support the strategic drivers by **tactic** likely to **strengthen** the **positive opinion** of **stakeholders** for the **brand**?
 - How to **anticipate** the **impact** of **future medical investment** options on the brand use?
 - How to **monitor the quality** of **execution** and the **impact** of **medical investment decisions**?

Training Program

Example of a One-Day Program¹

- 8:30 Introduction to the program
- 8:40 Concepts, methods and tools related to Medical Brand Plans
- 9:00 **Module 1:** Situation analysis of the medical environment corresponding to the different indications of the brand Stakeholders' need, opinion and behavioral analysis
- 10:30 *Break*
- 10:50 Advanced SWOT analysis
- 12:00 **Module 2:** Medical brand objective / sub-objectives setting
- 13:00 *Lunch*
- 14:00 **Module 3:** Crafting medical strategic drivers
- 15:00 **Module 4:** Medical tactics selection
- 16:00 *Break*
- 16:20 **Module 5:** Medical tactics monitoring with specific metrics
- 17:20 Conclusion and key takeaways
- 17:30 End of the program

Target Audience

- Collaborators from the Medical Affairs departments, involved in the development of Medical Brand Plans, 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 Medical Brand Plans

Recommendations for Affiliates

- The quality of Medical Brand Plans is often sub-optimal due to a weak building process, a lack of time and understanding of the benefits that can be drawn from such an exercise
- This position paper proposes a structure, a method and practical tools to facilitate the building of best-in-class Medical Brand Plans
- Such Medical Brand Plans have shown to enhance the efficiency and efficacy of medical activities carried out to support the brand

*“High-Performance Medical 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
 - 80 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