Best-in-Class Medical Science Liaisons

Methods
Tools
Advice

How to Boost Medical Science Liaisons Competence & Performance

Position Paper
February 2017

Smart Pharma Consulting
Introduction

This position paper proposes strategic and operational methods, tools and advice to boost Medical Science Liaisons (MSLs) competence and performance

Context & Objective

- Medical Science Liaisons (MSLs) play a pivotal role to maintain a close relationship with KOLs\(^1\) who are instrumental in:
  - Developing new products through their collaboration in pre-clinical and / or clinical trials
  - Raising the awareness and the preference – indirectly or directly – for their products in the mind of HCPs\(^2\) but also of health authorities, PAGs\(^3\), individual patients, etc.

- The increasing role of Medical Science Liaisons (MSLs) results from:
  - New molecular entities becoming more and more complex…
  - … and mainly prescribed by specialists, less and less inclined to be informed by medical reps

- In this position paper, Smart Pharma Consulting proposes:
  - Methods, tools and advice to boost MSLs competence and performance
  - KOL Partnership Model to recruit and manage KOLs in a more efficient and effective way

Sources: Smart Pharma Consulting analysis

\(^1\) Key Opinion Leaders – \(^3\) Health Care Professionals – \(^3\) Patient Advocacy Groups
1. MSLs’ role & responsibilities

MSLs are the field team of medical affairs in pharma companies, who are dedicated to the development of relationships with KOLs and to high-level scientific communications.

### Overview

- MSLs are one of pharma companies’ field teams dedicated to enhance the full exchange of scientific information with physicians, especially with KOLs
- MSLs have a more robust scientific background than medical representatives, such as: MSc, MD, Pharm. D, PhD degrees (90% of them have a doctorate degree)
- MSLs were first established by Upjohn Pharmaceuticals (now Pfizer) in 1967 with the objective to build a strong relationship with KOLs
- The central activity of MSLs is to develop long-term, peer-to-peer relationships with KOLs
- MSLs are in most cases affiliated to the medical affairs department (whereas med reps. are affiliated to the sales / marketing department)

### Core activities of MSLs

1. Build relationships with KOLs (and other HCPs)
2. Make scientific communications (congresses, staff, symposia, etc.)
3. Support trials (both company sponsored and investigator initiated)
4. Ensure trainings (of speakers, med. reps. and new MSLs)
5. Gather and report competitive intelligence data

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Sources: MSL Society – “An insight into the emerging role of regional medical advisor in the pharmaceutical industry”, Perspectives in Clinical Research, 2013 – Smart Pharma Consulting analysis

1 Other names than MSLs can be used by pharmaceutical companies such as: Medical Liaisons, Regional Medical Managers, Regional Scientific Managers, Scientific Affairs Managers, Medical Information Scientists, Clinical Liaisons – 2 Excluding administrative time
1. MSLs’ role & responsibilities

MSLs are often asked to cover a large scope of activities in collaboration with both internal and external stakeholders

**MSLs’ detailed core activities**

- Identification, selection and collaboration with KOLs: setting-up of boards, organization and participation in scientific information meetings, development of continuous medical education (CME) projects, patients or physicians associations funding, etc.
- Management of Investigator Initiated Studies (IIS)\(^1\): requests processing and follow-up
- Invitations to congresses / symposia, etc.
- Presence in congresses and attendance to competitors’ presentations
- Desk research: on competitors, on therapeutic areas, on medico-economic studies
- Critical review of scientific papers
- Answers to HCPs’ medical questions
- Participation in scientific information meetings (staffs, face to face, etc.) for on- and off-label indications, re. therapeutic areas and products in the pipeline
- Presentation of studies in congresses / symposia
- Training and certifications of med. reps.
- Training of other functions, such as marketing
- Training of speakers communicating on companies’ products / therapeutic areas, etc.
- Writing of supports for FAQ&O\(^2\)
- Identification of needs and demands of KOLs for IIS
- Identification of high potential centers and investigators for company-sponsored clinical trials
- Support for studies carried out and followed-up jointly with CRAs (Clinical Research Associates)

Source: “An insight into the emerging role of regional medical advisor in the pharmaceutical industry”, Perspectives in Clinical Research, 2013 – Interviews with 5 MSLs – Smart Pharma Consulting analysis

\(^1\) Also called: Investigator-Initiated Trials or IIT

\(^2\) Frequently Asked Questions & Objections
1. MSLs’ role & responsibilities

MSLs must support KIMs\(^1\) who facilitate regional market access, KAMs\(^2\) who ensure listing of products at hospital level and marketing and sales reps who promote them

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The transversal role of MSLs

### Key interactions with corporate medical affairs

- **Medical strategy:** Determined by corporate medical affairs and translated locally by MSLs
- **Coordination:** Between corporate and MSLs projects with KOLs, especially re. company-sponsored clinical trials and IIS\(^1\)
- **Training:** Corporate medical affairs ensure trainings of MSLs
- **Feed-back from the field:** On future KOLs, on clinical trial centers needs, on frequent medical questions / objections, etc.

### Key interactions with marketing

- **Brand teams:** Integration of MSLs’ key activities/actions
- **Coordination:** Between marketing and MSLs projects with KOLs
- **Training:** MSLs may train marketing teams on medical issues

### Key interactions with sales team

- **Medical information:** Answers to scientific questions / objections
- **Local scientific events:** Stafs and scientific meetings co-organization (scientific part by MSLs and logistic by med. reps.)
- **Training:** med. reps. on scientific / medical environment related to the promoted brand

### Key interactions with Key Account Managers (KAMs)

Increasing number of interactions between MSLs and KAMs:

- **Scientific presentations** of MSLs during hospital listing processes

### Key interactions with Key Institution Managers (KIMs)

KIMs, who interact with regional health authorities and payers, may ask for MSLs help to highlight the medical or even medico-economic profile / benefit of a brand or of a TA\(^2\)

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Source: “The changing role of the modern MSL”, Pharmaceutical Market Europe, October 2015 – Interviews with 5 MSLs – Smart Pharma Consulting analysis

\(^1\) Key Institution Managers – \(^2\) Key Account Managers – \(^3\) Investigator Initiated Studies – \(^4\) Therapeutic Area

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## 2. MSLs’ issues & challenges

MSLs teams face recurrent issues that can be addressed if pharma companies implement the relevant actions

### Six main issues facing MSLs teams

<table>
<thead>
<tr>
<th>Key issue</th>
<th>What to do?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Distinction from sales / marketing</strong></td>
<td>▪ Role confusion persists in the mind of some HCPs / KOLs</td>
</tr>
<tr>
<td><strong>2. Disconnection with corporate initiatives</strong></td>
<td>▪ Initiatives initiated by corporate (clinical trials, etc.) not coordinated with MSLs teams</td>
</tr>
<tr>
<td><strong>3. Distraction from core activities</strong></td>
<td>▪ MSLs, for being well trained and effective professionals, cannot contribute to tasks such as health economics, outcomes research, etc.</td>
</tr>
<tr>
<td><strong>4. Extensive geographical zones</strong></td>
<td>▪ MSLs teams being small; they have to cover large geographic areas and must undertake frequent travels</td>
</tr>
<tr>
<td><strong>5. Complex regulatory environment</strong></td>
<td>▪ Government agencies keep on scrutinizing on how products are promoted by pharma companies</td>
</tr>
<tr>
<td><strong>6. Trend towards specialization</strong></td>
<td>▪ The development of secondary care products and the increasing complexity of science lead to major training requirements for MSLs</td>
</tr>
</tbody>
</table>

Sources: “Implementing a MSL team”, Publicis Touchpoint – “Aligning the Activities and Goals of Medical Science Liaison Teams for Strengthened Corporate Sustainability”, MSL World – Interviews with 5 MSLs – Smart Pharma Consulting analysis

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Best-in-Class MSLs – How to boost their Competence & Performance 6 February 2017 Smart Pharma Consulting
### 2. MSLs’ issues & challenges

MSLs’ most important challenge is certainly to create highly valued interactions and trusted collaborative relationships with KOLs to support companies and products.

#### MSLs’ challenges – Required skills – Expected outputs

<table>
<thead>
<tr>
<th>MSLs’ challenges</th>
<th>Required skills</th>
<th>Expected outputs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keeping up with the latest scientific information</td>
<td>Excellent scientific knowledge and understanding to carry out peer-to-peer discussions during interactions with KOLs</td>
<td>Ability to inform, challenge and / or convince KOLs based on robust and updated scientific evidence</td>
</tr>
<tr>
<td>Building strong and sustainable relationships with KOLs</td>
<td>Strong communication skills to properly position: – The company’s therapeutic expertise – A given product at pre- or post-launch stage</td>
<td>Convince KOLs to carry out research or clinical studies</td>
</tr>
<tr>
<td>Managing multiple and diversified tasks</td>
<td>Ability to manage projects with KOLs (e.g. while supporting investigators-initiated studies or company-sponsored clinical trials)</td>
<td>Convince KOLs to support the company’s products</td>
</tr>
<tr>
<td></td>
<td>Ability to train / teach and / or develop support documents for companies’ collaborators and / or HCPs</td>
<td>Identification of clinical research opportunities with KOLs</td>
</tr>
<tr>
<td></td>
<td>Capture and share insight gathered through interactions between KOLs’ and all customer-facing teams</td>
<td>Effective implementation of clinical research trials</td>
</tr>
<tr>
<td></td>
<td>Cooperate and coordinate activities with other customer-facing collaborators and corporate teams interacting with KOLs</td>
<td>Improvement of participants’ knowledge, understanding of the disease area and of the benefits of the company’s products</td>
</tr>
<tr>
<td></td>
<td>Comply with national regulations and ethical considerations regarding disseminated information (e.g. off-label)</td>
<td>Profiling and selecting the relevant KOLs to partner with</td>
</tr>
<tr>
<td></td>
<td>Ability to manage time, set priorities and adjust unforeseen changes inherent to MSLs’ job</td>
<td>Fulfilling of KOLs needs related to MSL activities</td>
</tr>
<tr>
<td></td>
<td>Ability to train / teach and / or develop support documents for companies’ collaborators and / or HCPs</td>
<td>MSLs being the preferential contact of KOLs, they will ensure consistent interactions and address potential issues</td>
</tr>
<tr>
<td></td>
<td>Capture and share insight gathered through interactions between KOLs’ and all customer-facing teams</td>
<td>Prevent the company to be sued and to be fined</td>
</tr>
<tr>
<td></td>
<td>Cooperate and coordinate activities with other customer-facing collaborators and corporate teams interacting with KOLs</td>
<td>Timely and proper execution of multiple tasks under the responsibility of MSLs</td>
</tr>
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<td>Comply with national regulations and ethical considerations regarding disseminated information (e.g. off-label)</td>
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<td>Ability to manage time, set priorities and adjust unforeseen changes inherent to MSLs’ job</td>
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Sources: “The changing role of the modern MSL” Pharmaceutical Market Europe October 2015 – Smart Pharma Consulting analysis
3. MSLs’ Strategic Plan

MSLs’ activities should be integrated in a Regional Strategic Plan to ensure synergies with marketing, sales, market access and patient adherence departments’ activities

Integrated Regional Strategic Plan – Principle

**Integrated National Strategic Plan**

Men differ less in their abilities...
...than the degree to which they use them”

December 2015

**Integrated Regional Strategic Plan**

Men differ less in their abilities...
...than the degree to which they use them”

December 2015

**Medical Section**

- **Collaborators:** MSLs
- **Key clients:** national and regional KOLs
- **Key objectives:** build strong and sustainable relationships with KOLs to develop advocacy
- **Key activities:** interactions with KOLs, scientific lectures at congresses, symposia, staff meetings, support of research clinical trials, training of speakers and collaborators from marketing and sales teams, support of Key Institution Managers (KIMs) and Key Account Managers (KAMs) while meeting their clients, competitive intelligence initiatives

**Marketing & Sales Section**

- **Collaborators:** brand managers, area managers, medical representatives
- **Key clients:** physicians, retail and hospital pharmacists
- **Key objectives:** strengthen brand preference
- **Key activities:**
  - **Marketers:** crafting of a brand preference strategy leveraging: brand attributes, perceived quality of associated services and corporate reputation
  - **Sales forces:** medical calls, invitations to medical meetings, congresses and proposal for services likely to strengthen brand preference

**Access & Adherence Section**

- **Collaborators:** Key Account Managers (KAMs) and Key Institution Managers (KIMs)
- **Key clients:** regional health authorities, regional payers, hospital directors, hospital purchase managers, PAGs, etc.
- **Key objectives:** facilitate the hospital listing, and improve patient adherence
- **Key activities:** development of medico-economic studies to facilitate the market access of brands and support of projects to improve patients adherence, to promote the proper use of drugs

Sources: Smart Pharma Consulting

1 In compliance with the national regulations and the companies’ internal policies – 2 Patient Advocacy groups
3. MSLs’ Strategic Plan

MSLs’ activities should be defined in an Integrated Regional Strategic Plan in coordination with marketing, sales, market access and adherence departments.

**Integrated Regional Strategic Plan – Structure of the Medical Section**

### Structure

- **Situation analysis**
  - KOLs mapping (level of influence – advocacy behavior)
  - Activity review (quantitative and qualitative analysis):
    - KOLs’ partnership (calls, preparation of staff meetings, invitation to congresses, support of IIS\(^1\) and/or of the company-sponsored clinical trials, etc.)
    - Participation in congresses
    - Training of speakers, of marketing and sales collaborators
    - Support to Key Institution Managers (KIMs) in charge of regional market access and patient adherence programs
    - Support to Key Account Managers (KAMs) in charge of product listing at hospital (or purchasing platform) levels in highlighting medical benefits
    - Competitive intelligence data gathering and analysis
  - Measurement and assessment of activities’ impact
  - MSL Advanced SWOT analysis\(^2\)

- **Ambition & strategic priorities**
  - Ambition setting
  - Strategic priorities to fulfill the ambition set (MSL Strategy Card)\(^2\)
  - Key activities to support strategic priorities:
    - Shared activities with other departments (e.g. marketing, sales, KAMs, KIMs)
    - Non-shared activities
  - Monitoring of the quality of execution and impact of activities

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Sources: KOL Partnership Model 2016 by Smart Pharma Consulting

\(^1\) Investigator Initiated Studies – \(^2\) Developed by Smart Pharma Consulting
# 3. MSLs’ Strategic Plan

The Advanced SWOT is a useful tool to help MSLs analyze and evaluate regional medical opportunities and threats as well as their own competitive position.

## Integrated Regional Strategic Plan – Specific tools of the Medical Section (1/3)

### MSL Advanced SWOT

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Relative importance¹</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What regional changes are likely to favor the medical environment?</strong></td>
<td></td>
</tr>
<tr>
<td>National &amp; regional regulations relating to MSLs’ activities (e.g. off-label communication, invitation process to congresses, grants, etc.)</td>
<td></td>
</tr>
<tr>
<td>KOLs’ opinion &amp; position re. the company and its products, KOL’s level of influence</td>
<td></td>
</tr>
<tr>
<td>Scientific events: regional congresses, other meetings</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Threats</th>
<th>Relative importance¹</th>
</tr>
</thead>
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<td><strong>What regional changes are likely to disfavor the medical environment?</strong></td>
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<td>Scientific events: regional congresses, other meetings</td>
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</tbody>
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<table>
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<tr>
<th>Strengths</th>
<th>Relative importance¹</th>
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</thead>
<tbody>
<tr>
<td><strong>What are the absolute or relative advantages of the company’s medical activity at regional level vs. competition?</strong></td>
<td></td>
</tr>
<tr>
<td>1 Relationships with KOLs: quality and sustainability</td>
<td></td>
</tr>
<tr>
<td>2 Scientific communications: congresses, staff meetings, symposia, etc.</td>
<td></td>
</tr>
<tr>
<td>3 Support to trials: company-sponsored trials and IIS²</td>
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</tr>
<tr>
<td>4 Training of speakers, med. reps, new MSLs, etc.</td>
<td></td>
</tr>
<tr>
<td>5 Competitive intelligence: data gathering and analysis</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Weaknesses</th>
<th>Relative importance¹</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What are the absolute or relative disadvantages of the company’s medical activity at regional level vs competition?</strong></td>
<td></td>
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<tr>
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</tr>
</tbody>
</table>

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1 Ranking from 5 = very important to 1 = limited importance – ² Investigator Initiated Studies

Sources: Smart Pharma Consulting
3. MSLs' Strategic Plan

The MSL Strategy Card will help design a “one-page strategy” including his ambition, the strategic priorities to meet it and the corresponding medical activities.

### Integrated Regional Strategic Plan – Specific tools of the Medical Section (2/3)

**MSL Strategy Card**

<table>
<thead>
<tr>
<th>Therapeutic area A</th>
<th>Therapeutic area B</th>
</tr>
</thead>
</table>

#### Regional Medical Ambition

#### Strategic priorities

1. **Strategic priority #1** to achieve the ambition
2. **Strategic priority #2** to achieve the ambition
3. **Strategic priority #3** to achieve the ambition
4. **Strategic priority #4** to achieve the ambition

#### Key activities

1. Key activities¹
2. Key activities¹
3. Key activities¹
4. Key activities¹

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¹ To support the corresponding strategic priority

*Sources: Smart Pharma Consulting*
3. MSLs’ Strategic Plan

Qualifying MSLs’ activity is a challenge, however, several qualitative and quantitative metrics can be considered for pharma companies to ensure a proper monitoring.

Integrated Regional Strategic Plan – Specific tools of the Medical Section (3/3)

Recommendations of metrics to monitor MSLs’ activities

- Number of partnerships initiated with KOLs
- Number of contacts and / or time spent with KOLs in face-to-face meetings, teleconferences, staff meetings, etc.
- Qualitative assessment of KOLs partnership management

- Number of competitive reports
- Number of congresses reviews
- Quality of information gathered

- Number of people trained
- Qualitative feedbacks of trained people

- Number of speeches delivered
- Number of articles authored
- Number of attendees
- Qualitative feedbacks of attendees

- Number of IIS\(^1\) and / or company-sponsored clinical trials submitted / completed
- Number of investigators or patients included in company sponsored-clinical trials

Source: Interviews with 5 MSLs – Smart Pharma Consulting analysis

\(^{1}\) Investigator initiated studies

Best-in-Class MSLs – How to boost their Competence & Performance

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An effective collaboration with KOLs requires to follow a rigorous recruitment process that should be based on the gathering of accurate information.

**The 4 key steps**

1. **Objective setting**
   - What to expect from KOLs?
   - What does the KOL expect from us?

2. **Targeting**
   - Who are the KOLs that should be selected and why?

3. **Implementation plan**
   - Which actions/interactions should be carried out with KOLs?

4. **Follow-up**
   - How to guarantee an effective/efficient relationship with KOLs?

- Relationships with KOLs should be defined according to the set objectives.
- Then, the prospective KOLs should be profiled and targeted.
- Once KOLs have been selected, their interactions with the pharma company and the activities they are expected to implement should be defined and formalized in an implementation plan.
- The implementation of the plan should be carefully monitored with the help of KPIs (Key Performance Indicators) and of KEIs (Key Execution Indicators).
4. KOL Partnership Model

Before defining the activities to be carried out by KOLs, specific objectives, consistent with a global objective, have to be set for each of them.

**Objective setting**

Partnerships with KOLs should be part of a global strategy, including also market access, medico-marketing and sales initiatives.

**Global objective**

Define precisely what is expected from the partnership with KOLs, in terms of direct or indirect benefits for the product under development or marketed by the pharma company.

**Specific objectives set by KOL**

Define specifically what is expected from each KOL to support the product and what support the latter expects from the pharma company, on a professional standpoint.

Sources: Smart Pharma Consulting
4. KOL Partnership Model

The objective of the KOL partnership and the corresponding activities will depend on where the product is positioned on its life cycle

Examples of KOL roles according to the product life cycle

Product life cycle

R&D and registration phases

- Research & pre-clinical phases
- Phase I
- Phase II
- Phase III
- Approval
- Pricing & reimbursement
- Marketing

Commercial phase

Examples of KOL roles

1. Identification of unmet medical needs
2. Identification of pharmacological targets
3. Implementation of R&D activities
4. Advice on target product profile and labelling
5. Presentation of clinical results and of product benefits to regulators and payers
6. Product awareness building & Influence on prescribing choices
7. Participation in medical education programs
8. Contribution to patient management programs

Sources: Adapted from GBI Research, Market Rx, by Smart Pharma Consulting

1 Through articles, lectures, etc. – 2 Through Continuous Medical Education (CME) programs – 3 Through projects carried out with patient advocacy groups (PAGs)
### 4. KOL Partnership Model

The targeting phase should enable to identify the KOLs with whom a partnership should be beneficial and to understand their networks of influence

#### 2 KOLs targeting – Methodology (1/2)

<table>
<thead>
<tr>
<th>Key questions</th>
<th>What to do</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Selection criteria</strong></td>
<td>▪ What are the relevant selection criteria to be used considering the final objective?</td>
</tr>
<tr>
<td>▪ Review of relevant criteria (e.g. level of influence, scope of influence, scientific/media awareness, membership of a network, etc.)</td>
<td>▪ Selection of a limited number of relevant criteria</td>
</tr>
</tbody>
</table>

| **KOLs profiling**                                                            | ▪ What information should be collected?                                                         |
| ▪ How to collect and analyze this information?                                | ▪ Internal / external databases review to qualify KOLs                                           |
|                                                                              | ▪ Assessment of the number of publications, quotes, lectures during conferences and congresses, etc. |

| **KOLs segmentation**                                                         | ▪ What is the degree of interest and the likely support of the KOL for the product?            |
|                                                                              | ▪ Mapping of preselected KOLs on a matrix according to the most relevant criteria                |
|                                                                              | ▪ Identification of KOLs’ networks                                                             |

| **KOLs selection**                                                            | ▪ Who are the KOLs that should be selected to partner with?                                     |
| ▪ For which kind of partnership?                                               | ▪ Selection of KOLs                                                                            |
|                                                                              | ▪ Preliminary definition of the type of partnerships to be carried out with the targeted KOLs    |

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Sources: Smart Pharma Consulting

Best-in-Class MSLs – How to boost their Competence & Performance
Relevant selection criteria and gathering of accurate and reliable information about the KOL profile are of utmost importance to optimize the value of the partnership.

**KOLs targeting – Methodology (2/2)**

**Screening process** (illustrative)

**Filter 1**
- **Field of expertise**
  - # of specialists in the country

**Filter 2**
- **Level of reputation & scope of influence**
  - Inclusion criteria
    - Reputations of the hospital/ward the KOL is working for
    - Reputations of the KOL (based on status, honors, publications, etc.)
    - Power of influence (on peers, health authorities, PAGs1)
    - Scope of influence (international, national, local)

**Filter 3**
- **Advocacy potential**
  - Inclusion criteria
    - Communication skills
    - Inclination to communicate (in favor of a product)

Sources: Smart Pharma Consulting

1 Patient advocacy groups

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Best-in-Class MSLs – How to boost their Competence & Performance

February 2017
4. KOL Partnership Model

The proposed matrix is a useful tool to prioritize the candidate KOLs to partner with and to pre-define the type of partnerships that could be considered with them.

**KOL targeting – Segmentation & selection**

- The proposed matrix facilitates the **final selection** (targeting) of pre-selected KOLs based on their **level of influence** and their inclination to support the development and/or the use of the pharma company product.

- The matrix helps to define the kind of **partnerships** to be set with the KOLs.

- The prioritization of the targeted KOLs should also take into account:
  - The **life cycle** of the product.
  - The **networks** of influence of the KOLs.

**Level of influence (Expertise x Reputation)**

<table>
<thead>
<tr>
<th>Lower</th>
<th>Moderate</th>
<th>Higher</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower</td>
<td>J</td>
<td>D</td>
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<tr>
<td>Moderate</td>
<td>K</td>
<td>E</td>
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<tr>
<td>Higher</td>
<td>A</td>
<td>B</td>
</tr>
<tr>
<td>Lower</td>
<td>L</td>
<td>I</td>
</tr>
</tbody>
</table>

**Advocacy potential**

- **Priority 1**
- **Priority 2**
- **Priority 3**
- **Not a Priority**

- **Networks of influence amongst KOLs**

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Sources: Smart Pharma Consulting
### 4. KOL Partnership Model

Guidelines for Recruitment

Qualification of KOLs should be documented with reliable data collected through desk research and field research (e.g. interviews of peers and of prospective KOLs)

#### How to qualify KOLs?

<table>
<thead>
<tr>
<th>What data to collect?</th>
<th>How to collect data?</th>
<th>How to analyze data?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong> (e.g. head of medical department, professor, age, public vs. private practice, place(s) of practice)</td>
<td>Internet, direct search</td>
<td>Being head of hospital and professor is a plus</td>
</tr>
<tr>
<td><strong>Field of expertise/interest</strong> in a therapeutic area, in a technique, etc.</td>
<td>Probing by MSL(^1), medical reps and other collaborators of the pharma company</td>
<td>KOLs should express their field of interest over the long term and their expectations from a partnership with the pharma company</td>
</tr>
<tr>
<td><strong>Level of reputation &amp; scope of influence</strong></td>
<td>Field research (e.g. peers, pharmacists interviews, etc.)</td>
<td>Internal or national level is preferable in general to local level (but it depends on the objective)</td>
</tr>
<tr>
<td><strong>Communication skills</strong></td>
<td>Analysis of past performances</td>
<td>Verbal communication (e.g. lectures, courses)</td>
</tr>
<tr>
<td><strong>Type &amp; level of communication</strong></td>
<td>Review of scientific articles published (PubMed/Medline, Google scholar, Expertscapes)</td>
<td>The higher the impact factor is, the better</td>
</tr>
<tr>
<td>– # articles published (impact factor(^2), peer-/- non peer reviewed journals, position as an author…)</td>
<td>Probing by collaborators of the pharma company and peers interviews to evaluate trainings, teaching activities and lectures</td>
<td>Each KOL should be ideally positioned as 1(^{st}) or last author in articles</td>
</tr>
<tr>
<td>– # of trainings p.a. (CME(^3))</td>
<td>Google searching for presence and quotes on the Internet</td>
<td>The higher the number of trainings, teaching seminars and lectures, the better</td>
</tr>
<tr>
<td>– Teaching activity at university</td>
<td></td>
<td>Perceived quality of articles, training, teaching and lectures should be assessed</td>
</tr>
<tr>
<td>– Presence on the Internet</td>
<td></td>
<td></td>
</tr>
<tr>
<td>– # of lectures (congresses, round tables)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>– # of quotes by journalists in current year</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Membership in learned societies</strong></td>
<td>On the website of the learned societies or by calling them</td>
<td>Being a member of the management board is a plus</td>
</tr>
<tr>
<td>– Title / position / activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Inclination to partner with a pharma company and to support its products</strong></td>
<td>Probing by collaborators of the pharma company</td>
<td>They should clearly express their interest in the product and the company…</td>
</tr>
<tr>
<td></td>
<td></td>
<td>… and in the types of partnerships they are looking for</td>
</tr>
</tbody>
</table>

---

\(^1\) Medical Science Liaison – \(^2\) It measures the average frequency with which the article has been cited in a particular year. It is used to measure the importance or rank of a journal by calculating the number of times its articles are quoted – \(^3\) Continuous medical education

Source: Smart Pharma Consulting

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Best-in-Class MSLs – How to boost their Competence & Performance

February 2017

[Smart Pharma Consulting]
4. KOL Partnership Model

To convince KOLs to partner, it is important to take into account their expectations and to highlight the benefits they will draw from it, in terms of professional development.

How to convince KOLs to partner?

What do they want?

- Qualify a KOL to design a partnership that will fulfill his professional expectations (simultaneously with that of the pharmaceutical company):
  - Is the KOL yet a partner of the pharmaceutical company?
  - What has qualitatively and quantitatively his level of involvement been?
  - What has his feed-back from previous collaborations been?
  - What is his mid- to long-term professional ambition?
  - What does he expect from pharmaceutical companies in general, and specifically?
  - Is he looking for a long-term partnership?
  - Is he more inclined to enter into a “win-win” partnership or a “fee-for-service” transaction?

What should be proposed?

- Based on the knowledge and understanding of the KOL’s professional expectations…
- … propose ideas – to be discussed – of activities to be carried out through the partnership
- Emphasize the benefits the KOL will draw in terms of personal awareness and competence development through the partnership:
  - Increasing awareness and fame through publication of articles, interviews in media, presentations during congresses, lectures during medical meetings, etc.
  - Increasing reputation and extending influence by participating to scientific works (e.g. clinical trials)
  - Professional development through the access to recent information, to high education programs\(^1\), by working in new research/medical areas, etc.
  - Funding of Investigator Initiated Studies (IIS)

Sources: Smart Pharma Consulting

\(^1\) Especially for Rising Opinion Leaders
# 4. KOL Partnership Model

Guidelines for Recruitment

The KOL ID card is a practical tool which contains in one single page the most important information required to qualify and then recruit pre-selected KOLs.

**Tool to facilitate the recruitment process: KOL ID card**

<table>
<thead>
<tr>
<th>KOL name</th>
<th>(First name – surname)</th>
<th>Medical status</th>
<th>Location</th>
<th>Address &amp; City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialty</td>
<td>(Oncology – cardiology, etc.)</td>
<td>Medical setting</td>
<td>Private hospital – public hospital – teaching hospital – private office</td>
<td>Country</td>
</tr>
</tbody>
</table>

### Specific objectives for the pharma company

- [ ]

### Specific benefits for the KOL

- [ ]

### KOL Profile

<table>
<thead>
<tr>
<th>Items</th>
<th>Assessment¹</th>
<th>Facts / Rationale</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field of expertise/interest in the therapeutic area</td>
<td>International - National - Local</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of reputation</td>
<td>Low -Medium-High</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Scope of influence</td>
<td>Low -Medium-High</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Advocacy potential</td>
<td>Low -Medium-High</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

### Recommendations

<table>
<thead>
<tr>
<th>Priority¹</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical department</td>
<td>Low -Medium-High</td>
</tr>
</tbody>
</table>

### Final decision

**Selection: YES - NO**

Rationale:

---

Sources: Smart Pharma Consulting

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² Circle your answer
4. KOL Partnership Model

An effective collaboration with KOLs requires to follow a rigorous recruitment process and to develop a precise action plan along with monitoring tools.

The 4 key steps

1. Objective setting
   - What to expect from KOLs?
   - What does the KOL expect from us?

2. Targeting
   - Who are the KOLs that should be selected and why?

3. Implementation plan
   - Which actions/interactions should be carried out with KOLs?

4. Follow-up
   - How to guarantee an effective/efficient relationship with KOLs?

- Relationships with KOLs should be defined according to the set objectives.
- Then, the prospective KOLs should be profiled and targeted.
- Once KOLs have been selected, their interactions with the pharma company and the activities they are expected to implement should be defined and formalized in an implementation plan.
- The implementation of the plan should be carefully monitored with the help of KPIs (Key Performance Indicators) and of KEIs (Key Execution Indicators).
4. KOL Partnership Model

Pharma companies should balance what they expect from KOLs in terms of activities and what they give them in terms of services to ensure a win-win partnership.

Services proposed to & activities carried out by KOLs

---

**Services proposed to KOLs** (Illustrative)

- **Access to scientific information**
  - (e.g. articles, databases, expert reports, clinical cases)
- **Technical support to publish articles**
  - (e.g. medical writing, proof reading, peer pre-review)
- **Slide kits for training/teaching programs**
- **Ad hoc support on demand basis**
  - (e.g. media training, training on statistics, change management in a ward)

**KOL Digital Platform (2.0)**

**Organization of peer meetings with top international KOLs**
- (e.g. congresses, symposiums, forums, etc.)

**Technical & funding support for Investigator Initiated Studies**

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**Activities carried out by KOLs** (Illustrative)

- **Article writing**
- **Press conference**
- **Advisory board member**
- **Participation to internal meetings**
- **Lectures during symposia**
- **Participation to scientific studies**
- **Training of peers / CME**
- **Promo material review**

---

Sources: Smart Pharma Consulting

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{Access limited to KOLs}  {Each KOL should have a dedicated Customer Manager (e.g. a MSL)}  {Such as Visual aids, leaflets for patients}  {Continuous Medical Education}  {Such as lectures to sales forces, face-to-face meetings with the marketing team, etc.}
4. KOL Partnership Model

If KOLs share the objective of the pharma company and accept to communicate, the following means can influence medical practices and help better position products.

Potential value of KOL activities (1/2)

- **Article writing**
  - KOLs may support the pharmaceutical company’s priorities by communicating in scientific journals, professional magazines or lay press regarding:
    - New medical approaches, new guidelines, patient management, etc. in a given therapeutic area, etc.
    - The position of its products in the therapeutic strategy
  - Perceived reliability by readers: H
  - Number of exposed readers: L to H

- **Lectures during symposia**
  - While giving lectures, KOLs may accept to cover topics of interest for the company…
    - … and/or position their products vs. direct competitors or indirect therapeutic alternatives
  - KOLs may also share their own experience as a prescriber of the company’s products
  - Perceived reliability by participants: M
  - Number of exposed attendants: L

- **Press conference**
  - Press conferences enable to have indirectly access to a larger number of readers
  - The messages conveyed by KOLs may sometimes be modified by journalists
  - It is rare for KOLs to make strong statements in favor of a product during a press conference
  - Perceived reliability by readers: M
  - Number of exposed readers: H

- **Training of peers / CME**
  - KOLs may communicate to their peers, to pharmacists, to nurses, etc., during training sessions regarding:
    - Medical topics of interest for the pharma
    - The position of its products in the therapeutic strategy
  - In such circumstances, KOLs may convey strong messages, if they decide to do so
  - Perceived reliability by participants: M-H
  - Number of exposed attendants: M

Sources: Smart Pharma Consulting

H: Higher – M: Medium – L: Lower

1 Continuous Medical Education
4. KOL Partnership Model

KOLs can be of great value through direct collaboration (by training, informing, giving advice, etc.) with medical, marketing and sales teams of the pharma company

Potential value of KOL activities (2/2)

- KOLs may play an effective role during internal meetings by:
  - Informing / training medico-marketing-sales teams about scientific trends and position of competitors
  - Role playing with sales reps (e.g. selling forums)
  - Being invited as a “guest star” to show collaborators the ability of the pharma company to partner with top medical leaders

- KOLs may collaborate with the marketing team by contributing to the creation of promotional materials
  - Thus, they can create value by:
    - Suggesting messages
    - Developing a scientific rationale to support messages/claims of the products
    - Assessing and editing the content of promotional materials (visual aid, booklet...)

- Advisory board meetings with KOLs should be preferred to individual meetings with KOLs when the objective is to:
  - Generate innovative ideas or concepts (brainstorming sessions)
  - Estimate key market trends (including stakeholders opinions and behaviors)
  - Obtain a consensual opinion regarding market environment, products development, marketing strategy, etc.

- Participation to scientific studies
  - KOLs, especially if they are supposed to sign or co-sign the corresponding publication, may be very helpful to:
    - Participate to the design of the study
    - Carry out the study (either about a given pathology only or a pathology & its treatments involving the pharmaceutical company product)

- Involvement of KOLs in medical/clinical studies will depend on their field of interest

Sources: Smart Pharma Consulting
The development of a “KOL Partnership Plan” or K2P is a centerpiece to maximize the probability of success while partnering with KOLs

**KOL Partnership Plan (K2P) – Why?**

- The development of a clear – precise – concise and shared implementation plan, called “KOL Partnership Plan” or K2P – between KOLs and pharmaceutical companies – will ensure that:
  - The objectives of the collaboration is well understood and agreed upon
  - The reciprocal expectations are well defined and accepted
  - The respective commitments are fulfilled and in due time
- The preparation of an implementation plan increases the probability of success of the partnership over time…
- … and minimizes the risks of mutual disappointments
- The KOL Partnership Plan (K2P) will facilitate the coordination and the communication across the pharmaceutical company and thus optimize synergies across market access, medical, marketing and sales departments
To build a useful and effective “KOL Partnership Plan”, it is recommended to follow the 5-step process proposed here-below:

<table>
<thead>
<tr>
<th>KOL Partnership Plan (K2P) – How?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1:</strong> Design of templates that can be shared with the KOLs and the pharmaceutical company’s collaborators (i.e. from market access, medical, marketing departments)</td>
</tr>
<tr>
<td><strong>Step 2:</strong> Filling up of the templates by the KOL Customer Manager assigned by the pharmaceutical company to the KOL (e.g. MSL) in coordination with the Medical Director and possibly with the Marketing Director.</td>
</tr>
<tr>
<td><strong>Step 3:</strong> Review and adjustment of the content of the K2P by the MSL with the KOL:</td>
</tr>
<tr>
<td>- Objectives</td>
</tr>
<tr>
<td>- Services proposed by the pharmaceutical company</td>
</tr>
<tr>
<td>- Activities to be carried out by the KOL</td>
</tr>
<tr>
<td>- Fees to be paid at a fair market value (if any)</td>
</tr>
<tr>
<td>- Monitoring process of each service/activity</td>
</tr>
<tr>
<td><strong>Step 4:</strong> Follow up of the K2P:</td>
</tr>
<tr>
<td>- Prepare the planned services/activities</td>
</tr>
<tr>
<td>- Analyze the quality of execution of these services/activities</td>
</tr>
<tr>
<td>- Reconsider – if not relevant anymore – planned services/activities</td>
</tr>
<tr>
<td><strong>Step 5:</strong> Assessment of the partnership:</td>
</tr>
<tr>
<td>- Twice a year by the KOL Customer Manager and the KOL to measure the level of mutual satisfaction and decide about potential adjustments to be carried out</td>
</tr>
<tr>
<td>- Once a year by a committee including: the Medical Director, the Marketing Director, the KOL Customer Manager, and possibly the General Manager, to evaluate the KOL partnership and decide about potential adjustments</td>
</tr>
</tbody>
</table>

Sources: Smart Pharma Consulting

1 If allowed by national and corporate regulations
4. KOL Partnership Model

The “KOL Partnership Plan” should include key information extracted from the KOL ID card\(^1\), specify the objectives of the partnership, its scope and duration

### KOL Partnership Plan (K2P) – Model: Introduction

<table>
<thead>
<tr>
<th>KOL name</th>
<th>(First name – surname)</th>
<th>Medical status</th>
<th>MD – head of medical department – professor of medicine, etc.</th>
<th>Medical setting</th>
<th>Private clinic – private hospital – public hospital – teaching hospital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interest/Expertise</td>
<td>(e.g. Pulmonology, cardiology, etc.)</td>
<td>Reputation/Influence</td>
<td>Private hospital – public hospital – teaching hospital – private office</td>
<td>Advocacy potential</td>
<td>Address &amp; City &amp; Country</td>
</tr>
<tr>
<td>KOL Customer Manager</td>
<td>(First name – surname – position in the company)</td>
<td>Role</td>
<td>(Describe briefly his role vis-a-vis the KOL)</td>
<td>Coordination with…</td>
<td>(Indicates the other collaborators whom to coordinate)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Objectives of the partnership</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific scope of the partnership(^2)</td>
<td></td>
</tr>
<tr>
<td>Duration of the partnership</td>
<td>Starting date</td>
</tr>
</tbody>
</table>

---

\(^1\) See the proposed format p.21 – \(^2\) Examples: Development of a digital tool to improve patients adherence, Coordination of a multi-centric study, Expert support to estimate the medico-economic value of a new product, Lectures during medical meetings organized with peers, etc.
4. KOL Partnership Model

The “KOL Partnership Plan” should also describe the services proposed to the KOL and the activities the latter will carry out, as well as monitoring indicators.

<table>
<thead>
<tr>
<th>Service or Activity #1</th>
<th>Pharma company objective</th>
<th>KOL objective</th>
<th>Key step description</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quality of execution Indicators</th>
<th>Expected</th>
<th>Achieved</th>
<th>Expected impact Indicators</th>
<th>Expected</th>
<th>Achieved</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

KOL Partnership Plan (K2P) – Model: Service/Activity Card

Sources: Smart Pharma Consulting

This card should be duplicated by service/activity

1 Best-in-Class MSLs – How to boost their Competence & Performance

February 2017
### 4. KOL Partnership Model

**Guidelines for Management**

Key execution and performance indicators are essential to optimize the chance of a proper execution of services/activities and of a win-win partnership

**Examples of tool to monitor partnerships with KOLs**

<table>
<thead>
<tr>
<th>Pharma company’s services</th>
<th>Key execution indicators (KEIs)</th>
<th>Key performance indicators (KPIs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Access to scientific information</td>
<td>▪ Interest (10-point scale)</td>
<td>▪ Global level of satisfaction of KOLs (10-point scale)</td>
</tr>
<tr>
<td>▪ Organization of peer meetings with top international KOLs</td>
<td>▪ Utility (10-point scale)</td>
<td>▪ Inclination of KOLs to support the pharma company products:</td>
</tr>
<tr>
<td>▪ Technical support to publish articles</td>
<td>▪ Practicality (10-point scale)</td>
<td>▪ Number of lectures / trainings / publications</td>
</tr>
<tr>
<td>▪ Technical &amp; funding support to IIS¹</td>
<td>▪ Implementation² (10-point scale)</td>
<td>▪ Quality/objectivity of messages conveyed to peers, pharmacists, patients, etc.</td>
</tr>
<tr>
<td>▪ Slide kits for training/teaching programs</td>
<td></td>
<td>▪ Increased level of KOLs awareness and reputation</td>
</tr>
<tr>
<td>▪ Ad hoc support on demand basis</td>
<td></td>
<td>▪ Increased level of products awareness and reputation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>KOLs’ activities</th>
<th>Key execution indicators (KEIs)</th>
<th>Key performance indicators (KPIs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Lecture during symposia</td>
<td>▪ Interest (10-point scale)</td>
<td>▪ Global level of satisfaction of attendees (10-point scale)</td>
</tr>
<tr>
<td>▪ Training of peers</td>
<td>▪ Utility (10-point scale)</td>
<td>▪ Inclination of attendees to support &amp; prescribe the product:</td>
</tr>
<tr>
<td>▪ Practicality (10-point scale)</td>
<td>▪ Implementation² (10-point scale)</td>
<td>▪ Number of lectures / trainings / publications</td>
</tr>
<tr>
<td>▪ Article writing</td>
<td>▪ Acceptance by recognized journals (scientific, medical, or in lay press, etc.)</td>
<td>▪ Quality/objectivity of messages conveyed to peers, pharmacists, patients, etc.</td>
</tr>
<tr>
<td>▪ Post on highly regarded websites</td>
<td></td>
<td>▪ Increased level of KOLs awareness and reputation</td>
</tr>
<tr>
<td>▪ Press conference</td>
<td>▪ Number of journalists and quality of articles</td>
<td>▪ Increased level of products awareness and reputation</td>
</tr>
<tr>
<td>▪ Article writing</td>
<td></td>
<td>▪ Impact factor (for scientific/medical journals)</td>
</tr>
<tr>
<td>▪ Post on highly regarded websites</td>
<td></td>
<td>▪ Number of broadcasted issues for lay press</td>
</tr>
<tr>
<td>▪ Press conference</td>
<td></td>
<td>▪ Number of views / likes on Internet</td>
</tr>
<tr>
<td>▪ Participation in scientific studies</td>
<td>▪ Implementation (number of patients recruited, timing, cost vs. plan)</td>
<td>▪ Contribution of content to support the product</td>
</tr>
<tr>
<td>▪ Publication of an article in a renowned scientific journal</td>
<td></td>
<td>▪ Publication of an article in a renowned scientific journal</td>
</tr>
<tr>
<td>▪ Impact of the publication on product reputation</td>
<td></td>
<td>▪ Impact of the publication on product reputation</td>
</tr>
</tbody>
</table>

Sources: Smart Pharma Consulting

¹ Investigator Initiated Studies — ² Logistics, timing, cost vs. plan
Conclusions

9 Recommendations *to Boost MSLs’ Competence & Performance*

1. Clarify MSLs’ roles and responsibilities to avoid confusion with medical representatives

2. Maintain a high scientific knowledge and understanding to guarantee high quality interactions and relationships with KOLs

3. MSLs’ activities should be consistent with their ambition and their strategic priorities, as defined both at national and regional levels

4. Develop an Integrated Regional Strategic Plan including a Medical section formalizing MSLs’ ambition, strategic priorities and key activities, in line with marketing, sales, market access and adherence departments priorities

5. Define quantitative and qualitative metrics to monitor MSLs’ activities and identify potential corrective measures to be introduced

6. Optimize MSLs’ limited time by prioritizing their efforts and using new communication technologies, whenever relevant

7. Apply the KOL Partnership Model as follows:
   a. Define clear and precise objectives for each of them
   b. Build the relationship on the basis of an exchange of services rather than a fee-for-service deal
   c. Ensure an open and transparent relationship
   d. Make sure that the services provided to the KOL contribute to fulfill his needs and expectations
   e. Don’t ask KOLs to promote your products, which would affect his reputation and your company’s one
   f. Make the best use of the KOL limited time by organizing useful exchanges
   g. Assign a KOL Customer Manager (e.g. a MSL) who will be the KOL-preferred contact point and who will ensure alignment and information sharing between all collaborators of your company in contact with him

9. Define internal guidelines and a control process to prevent any compliance issues that could damage the corporate reputation

Sources: Smart Pharma Consulting

1 Taking into account national regulations and internal company’s rules
1 Strategy
- Assessing the attractiveness of markets (Hospital / retail innovative products - Vaccines - OTC - Generics)
- Growth strategy
  - Optimization of marketing / sales investments
  - Development of a company in the hospital market
  - Business
  - Valuation for acquisition
  - Portfolio / franchise assessment
- Extension of product life cycle performance
  - Improvement mature products performance
  - Adaptation of price strategy
- Defense strategies vs. new entrants
- Competitive strategies in the hospital market
- Strategic partnerships companies / pharmacies

2 Management
- Facilitation and structuring of strategic thinking for multidisciplinary product teams
  - Key challenges identification
  - Strategic options formalization
  - Resource allocation optimization program
- Training of marketing and market research teams to sales forecast techniques (modeling and scenarios development)
- Development and implementation of a "coaching program" for area managers
  - Sales reps coaching
  - Regional action plans roll-out
- Development and implementation of a "sales techniques program" for sales forces (STAR

3 Organization
- Rethink of operational units organization
- Improvement of sales force effectiveness
- Improvement of the distribution channels covering the hospital and retail markets
- Development of a strategic planning process