



# RIGOROUS RESEARCH CREATES DEFENSIBLE STRATEGY TO UNLOCK HIDDEN MARKET FOR GLOBAL OEM, DELIVERS DOUBLE-DIGIT GROWTH

## CHALLENGE

A global original equipment manufacturer (OEM) client invested hundreds of millions of dollars to acquire a unique technology with immense market potential. After the acquisition, however, growth was much slower than originally anticipated.

While the technology marked a minimally invasive therapy breakthrough for a pervasive and deadly condition, it could only be used to treat certain subcategories of patients within the broader indication for the highly invasive therapy that has become the standard of care. The benefits of the minimally invasive therapy were very compelling, but a significant challenge existed in identifying the appropriate patients.

In addition, the OEM had significant market share in the more invasive technology, and did not want to undermine or diminish the value of the more invasive technology while it advocated for its new offering.

The client leadership team came to understand that many clinicians were reluctant to adopt the new minimally invasive therapy, fearing most patients might later experience disease

progression and require the more invasive standard of care treatment. Given this concern, physicians continued relying on the traditional options they already had confidence in and experience using.

As the leadership team prepared to make business strategy decisions, critical questions came under debate, including:

- How could the team effectively differentiate and position the minimally invasive therapy while protecting the well-earned trust the clinical community had in the standard of care?
- Did an identifiable patient population exist that would benefit most from the new technology? How big was it?
- Could the technology unlock new patients who currently were not being treated due to the invasiveness of the existing technology?
- What was the best way to maximize the value of both franchises in the marketplace?

Needing definitive, defensible answers, the global OEM hired Navigant to conclusively address these critical strategic questions.

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*"We came out of the project with a much clearer viewpoint on what we needed to do. The unique strategic market assessment methodology and findings helped us focus our efforts, prioritize our business strategies, and be less scattershot. We could confidently guide investments to systematically attack each of those adoption barriers with science, new products, and programs. At the highest level, five years into commercialization in the United States, global year-on-year growth is in double digits for our franchise. Things are going extremely well."*

## SOLUTION

Using a data-driven proprietary methodology, the Navigant team conducted a strategic market assessment to provide the comprehensive, fact-based analysis needed to answer these difficult questions and help identify a clear path forward.

Navigant built a detailed disease model to accurately size the total number of patients indicated for both therapies. The model demonstrated that while the total patient population was growing, the fraction who qualified for this therapy was slowly shrinking due to systemic changes in the treatment and epidemiologic landscape.

In addition, this analysis revealed the annual U.S. market opportunity for all therapy-indicated patients was more than 85% penetrated and relatively stable. This meant the predominant source of growth in the United States would need to come from converting patients within the existing market.

After extensive analysis and investigation, it became clear the best path forward was to orchestrate a change in clinical thinking around indicated patients. The current market already had a variety of invasive treatment options from which to choose. Given historical experience and physician comfort with these legacy technologies, a more data-driven and objective clinical framework would be needed to establish how the minimally invasive therapy fit within the overall therapeutic mix. This would require both development of a new framework and evolving the clinical algorithm to better match the right therapy with the right patient.

Historically, clinicians relied mostly on their own experiences to determine the option to use to treat patient types. While data had been emerging in regard to appropriate selection in the context of condition variances, this data was not absolute nor widely followed.

Furthermore, the geographic and center-to-center variability in the use of treatment options reported in the literature clearly demonstrated a lack of a systematic and objective framework for invasive care selection. This meant the global OEM could seize the opportunity to take a leadership role in developing a more formal, data-driven, and standardized clinical algorithm for optimizing and matching therapy and patient type, while simultaneously characterizing the best fit for its minimally invasive therapy without marginalizing or undermining the critical role of the invasive standard care options.

Navigant understood the key to providing this guidance, however, was determining if there was a scientific way to identify patients ideally suited for the minimally invasive therapy. Ultimately, these were patients at high risk for developing complications resulting from the invasive options, and at low risk for developing future clinical complications beyond the

capabilities of the minimally invasive treatment option. If these patients could be reliably identified with a practical clinical diagnostic algorithm, then every major positioning issue would be solved, an effective market development plan could be developed, and the true realizable potential for the minimally invasive therapy could be assessed — and achieved.

Navigant was able to determine which factors were likely to predispose patients to develop complications, as well as which factors most likely signaled a risk of needing an invasive treatment option in the future. Navigant uncovered a pattern after an extensive review of the clinical literature and diving deeply into the epidemiologic and registry data around the associated conditions, therapy options, and comorbid conditions.

Synthesizing the available clinical data enabled Navigant to identify and quantify the size of this unique patient subgroup. The conclusion? Up to 50% of eligible patients met the criteria to be candidates for the minimally invasive treatment. This meant the potential market opportunity for the breakthrough technology was five times greater than the original anticipated figure of up to 10%.

## RESULTS

The global OEM came away from the strategic market assessment with a much better understanding of the true market potential for the minimally invasive franchise, and, equally important, a solid plan for how to realize it. Taken together, these insights and data-driven approach provided the company with the foundation needed to aggressively fund and deploy focused, specific, and high-impact strategies and tactics. These initiatives helped:



Effectively position the minimally invasive therapy in the marketplace.



Give clinicians the confidence and information they needed to make informed decisions for individual patient needs.



Establish the global company as a leader in patient care support and refinement.



Drive higher overall market share while protecting the positioning of both product categories.



Give the leadership team a defensible calculation of the potential return on investment.

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## About Navigant

Navigant Consulting, Inc. (NYSE: NCI) is a specialized, global professional services firm that helps clients take control of their future. Navigant's professionals apply deep industry knowledge, substantive technical expertise, and an enterprising approach to help clients build, manage, and/or protect their business interests. With a focus on markets and clients facing transformational change and significant regulatory or legal pressures, the firm primarily serves clients in the healthcare, energy, and financial services industries. Across a range of advisory, consulting, outsourcing, and technology/analytics services, Navigant's practitioners bring sharp insight that pinpoints opportunities and delivers powerful results. More information about Navigant can be found at [navigant.com](http://navigant.com).

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