

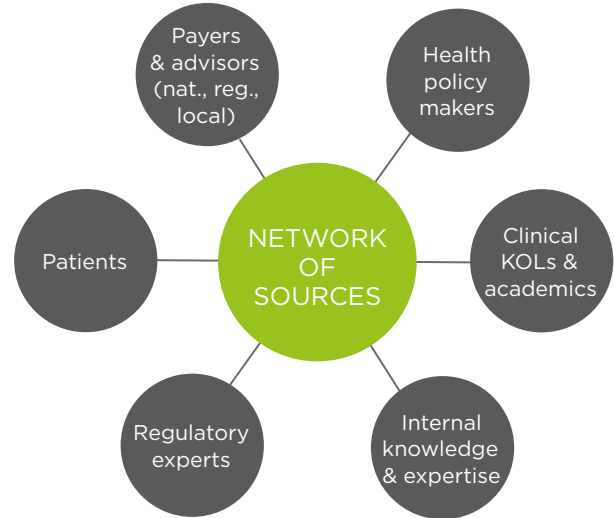
MULTI-MARKET, MULTI-STAKEHOLDER RESEARCH

Global market access strategy in a world characterized by extensive health reforms and increasing budgetary pressures requires an in-depth knowledge of healthcare systems, and an equally broad network of stakeholders.

Navigant can operationalize multi-country, multi-stakeholder (e.g. payer, regulatory, pharmacist, purchaser, KOL, physician and patient) qualitative research to address a broad range of strategic questions for our clients in the pharmaceutical, biotechnology and medical device industries.

OUR NETWORK AND CAPABILITIES

- We personally manage our global network of payers, KOLs, policy makers and leading academics.
- Our global network covers over 40 markets and continues to expand.
- Our network includes the EU markets, Central & Eastern Europe, US, Canada, Asia-Pacific, Latin America, Middle East & North Africa.
- We speak 15 major languages fluently in-house, enabling us to conduct stakeholder interviews internally in key established and emerging markets.
- Navigant teams adhere to local, national and international standards and follow the legal/ethical guidance and requirements, including, but not limited to European Pharmaceutical Market Research Association (EPHMA), British Healthcare Business Intelligence Association (BHBIA) and the Physician Payments Sunshine Act.



APPROACH

Navigant tailors each stakeholder sample and primary research approach to ensure optimal engagement with the most relevant experts, and to reveal the most appropriate insights to address challenges faced by our clients.

Group	Method	Pros	Cons	Insights
Individual	ONLINE SURVEYS	<ul style="list-style-type: none"> ✓ Focus on specific views of individual stakeholder ✓ Possible to recruit large number stakeholders for quantitative research 	<ul style="list-style-type: none"> ⚠ Stakeholders less engaged and some, top KOLs may refuse online surveys 	Online surveys and telephone discussions can provide comprehensive feedback across a large sample of respondents
	TELEPHONE DISCUSSIONS	<ul style="list-style-type: none"> ✓ Focus on specific views of individual stakeholder ✓ Recruitment less challenging and possible to have a semi-quantitative approach 	<ul style="list-style-type: none"> ⚠ Stakeholders less engaged and top KOLs may refuse telephone discussions 	
	FACE TO FACE DISCUSSIONS	<ul style="list-style-type: none"> ✓ Advisors prefer face to face interaction ✓ Provide open & honest feedback in person ✓ Greater control of potentially sensitive stimulus material 		
	SMALL MIXED STAKEHOLDER GROUPS	<ul style="list-style-type: none"> ✓ Simulate real world stakeholder mix interaction and decision making ✓ Small group enables greater interaction than advisory boards ✓ Facilitation possible in native language 		
	MARKET SPECIFIC ROUND TABLE	<ul style="list-style-type: none"> ✓ Focus on country specific issues ✓ Large number advisors can be engaged by conducting multiple round tables ✓ Allows flexibility over date and location of workshop 		
Large Group	ADVISORY BOARDS	<ul style="list-style-type: none"> ✓ Manufacturer can engage directly in discussion 	<ul style="list-style-type: none"> ⚠ Logistical complexity: need for large venue, accommodation, international travel, IT audio-visual and translation support 	Direct manufacturer engagement allows first hand information gathering

APPLICATIONS

The Navigant Life Sciences team has extensive experience executing primary research to understand and develop strategies identifying optimal clinical trial design, assessing product profiles and price potential, and identifying evidence requirements pre- and post-launch.

LIFE SCIENCES GLOBAL MARKET ACCESS CENTER OF EXCELLENCE:

ENVIRONMENT:

- Payer / stakeholder mapping
- Unmet needs & value driver assessment
- TPP Assessment & evidence requirements
- Payer funds flow / care re-design & pathway implementation
- Coding/Billing & Reimbursement Analysis

VALUE:

- Value Proposition Optimization
- Key Value Message Testing by stakeholder group
- Value story development
- Objection handling
- Roadmap for launch
- BD&L Assessments

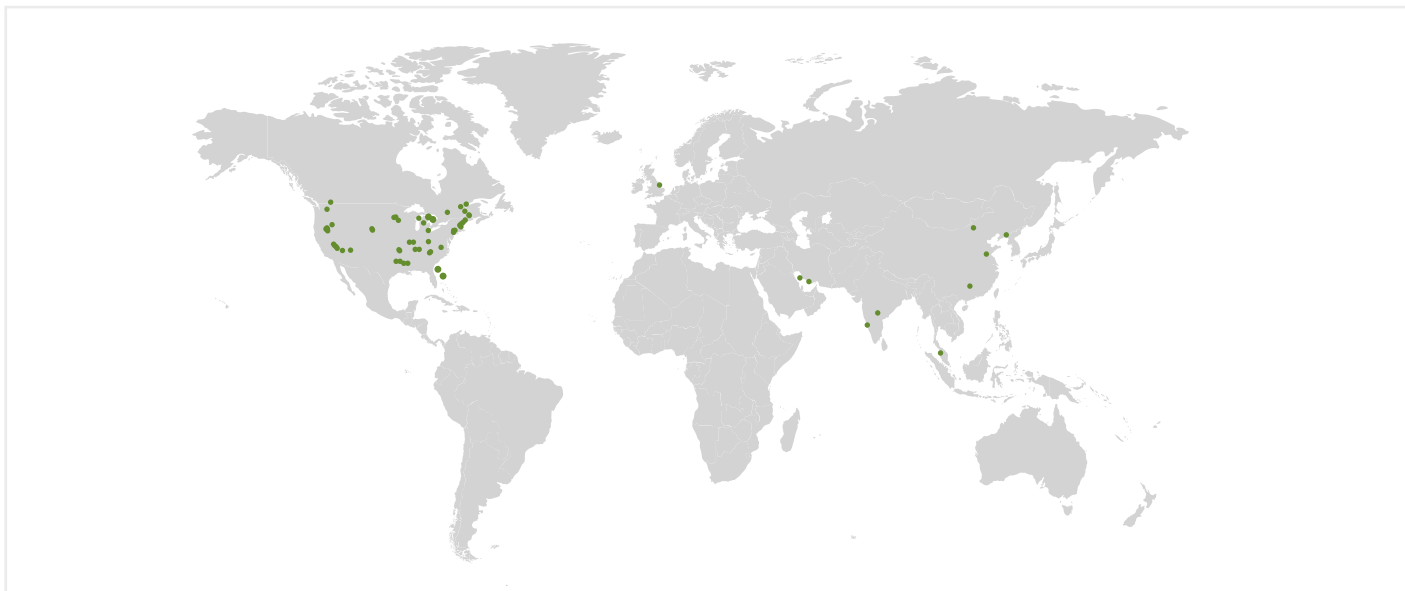
PRICING & REIMBURSEMENT:

- Qualitative Price Assessment
- Quantitative Price Finding & Access Studies
- Price build-up models
- Innovative pricing, contracting & managed entry agreements
- International Reference Pricing & Launch Sequence Modeling
- Mock Negotiations

EVIDENCE & Non-Interventional Studies:

- Clinical trial design & evidence requirements
- Retrospective Chart Reviews
- Pharmaco-epidemiological studies
- Patient / caregiver reported outcomes
- Registries
- Data mining

NAVIGANT'S GLOBAL OFFICES



- **Expertise in Pricing, Reimbursement & Access:** A dedicated global team with deep expertise in pricing, reimbursement and market access across product development and lifecycles
- **Global Network of Stakeholders:** Access to a broad range of stakeholders including national, regional and local payers, pharmacists, key opinion leaders (KOLs), physicians and patients
- **Rich Knowledge of Major Therapeutic areas:** Oncology, immunology, pain, cardiovascular, metabolics, antibiotics and vaccines
- **Rigorous Analysis to Deliver Tailored Actionable Insights:** Advanced analytics, innovative methodologies, and qualitative and quantitative research techniques designed to bring actionable insights
- **Industry Experience:** Extensive pharmaceuticals, biotech and medical devices experience in both commercial and clinical development
- **Global & Regional Perspectives:** We have the ability to deliver global, local and affiliate engagements through our global capabilities and resources

NAVIGANT'S LIFE SCIENCES EXPERTS

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