
Think i

CAPABILITY PRESENTATION

BUSINESS ANALYTICS AND CONSULTING

Our service offerings landscape spreads across marketing and reporting analytics

Competitive intelligence	Primary market research	Training	Commercial analytics	Sales analytics	Forecasting
• CI Monitoring • Conference Coverage • Product Profile Assessments • Attribute Analysis	• Patient research • Physician research • Payer research • Pharmacist research • Other HCP research	• Providing CI/Forecasting/ SFE/ HEOR at corporate level	• Data strategy • Leverage datasets for patient, physician, sales analytics • Pre & post launch analytics • Predictive modeling & Machine learning	• Sales force sizing • Physician and accounts segmentation • Customer targeting • Territory alignment & optimization • IC & reporting	• Strategic and non-strategic forecasts • Patient based • Non patient based • Demand planning • Launch forecast • BD&L forecast

Our pharma expertise* helps in *better business decision making for our clients

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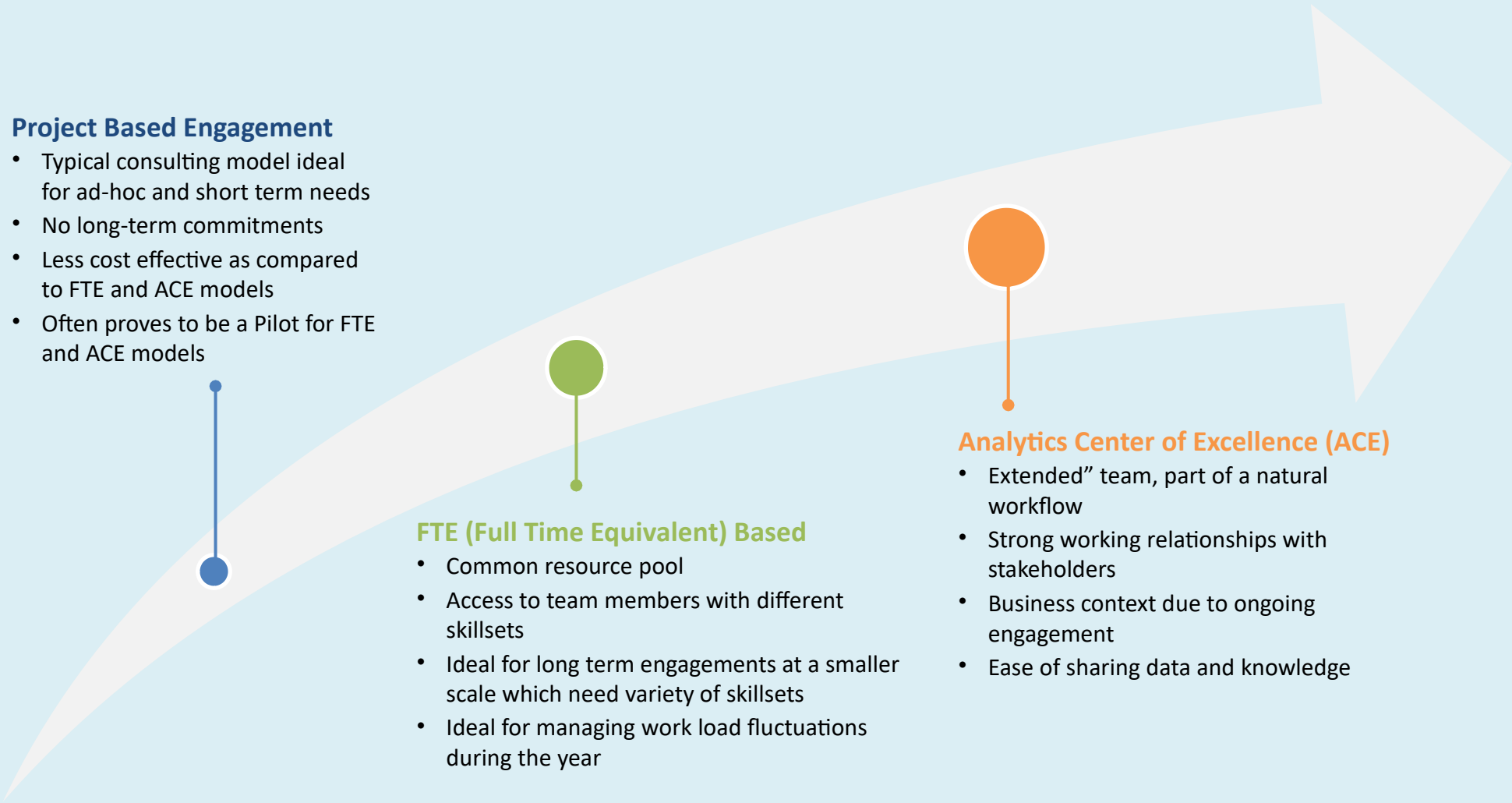
OUR ENGAGEMENT MODEL

Onshoring/ Offshoring hybrid models that range from project-based engagements for specific analytic services to offshore centers with broad range of service offerings



Project Based Engagement

- Typical consulting model ideal for ad-hoc and short term needs
- No long-term commitments
- Less cost effective as compared to FTE and ACE models
- Often proves to be a Pilot for FTE and ACE models

FTE (Full Time Equivalent) Based

- Common resource pool
- Access to team members with different skillsets
- Ideal for long term engagements at a smaller scale which need variety of skillsets
- Ideal for managing work load fluctuations during the year

Analytics Center of Excellence (ACE)

- Extended" team, part of a natural workflow
- Strong working relationships with stakeholders
- Business context due to ongoing engagement
- Ease of sharing data and knowledge

We possess wide range of capabilities to address every forecasting requirement

Across Geographies

Strategic Forecast

Demand/In-line Forecast

Launch Forecast

Clinical | Pre Launch | Launch | Growth | Maturity | Decline

Across Product Life Cycle

Across Market types

Pre Launch Support

- Market Assessment
- Analogue analysis
- Market events evaluation
- Unmet need analysis
- Disease model development & tracking

Post Launch LCM Support

- Multiple indications evaluation
- New formulation development
- Forecasting in new geographies
- Time series analysis
- Demand Forecast
- Event adjusted trending

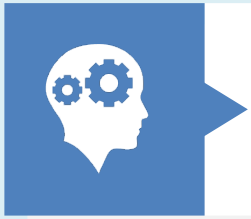
Post Exclusivity Loss Support

- Generic erosion modelling
- OTC/Generic strategies

Across Industry Types

MARKET RESEARCH CAPABILITIES

Our Primary Market Research Value Proposition Hinges around few Key Differentiators

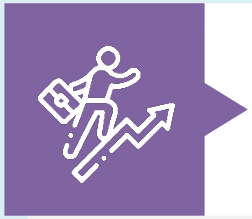


Experienced Market Research Team

- We have an experienced market research team comprised of **seasoned moderators, data analysts, statisticians and reporting experts**
- Our PMR leader who is at the helm of such research projects has **20+ years of clinical and market research experience**
- Experience spans across therapy areas, business situations and research designs varying between qual to quant

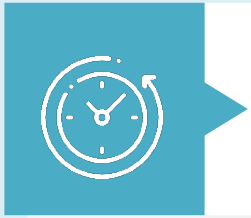
Triangulation of information from different sources

- The team has strong capabilities in conducting **secondary research, competitive intelligent and access to third party database** (IQVIA, Symphony Health) which enables a more robust approach to business challenges
- Our team hosts diversified skill sets with diversified background, training and experience, including **physicians, statisticians, business analysts, web\software developers**



Pharma Technology Enablers

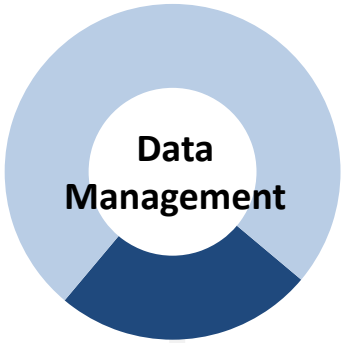
- We have **in-house reporting teams** who are experts in data management and **visualization tools** (Tableau, Spotfire, QuickSense)
- The development team also includes experts who can **leverage statistical analysis tools** like R and SAS



Turn Around Time

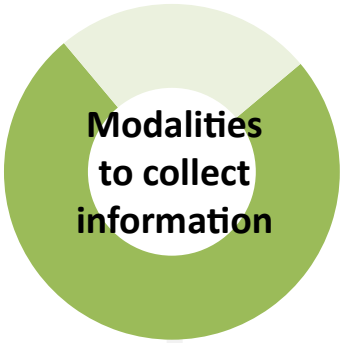
- **Leveraging a global delivery model** with 24/7 team support
- **The relay between the teams is seamless**, when it comes to output analysis, questionnaire design, transcript summarization and reporting

Technology: We have been leveraging technology while deploying different tools and techniques to gather and disseminate information

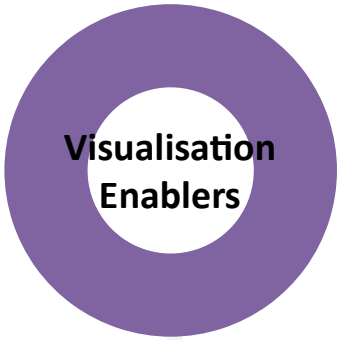


- Microsoft SQL Server
- Microsoft Access
- Microsoft Excel
- AWS

- R
- SPSS
- SAS
- MATLAB



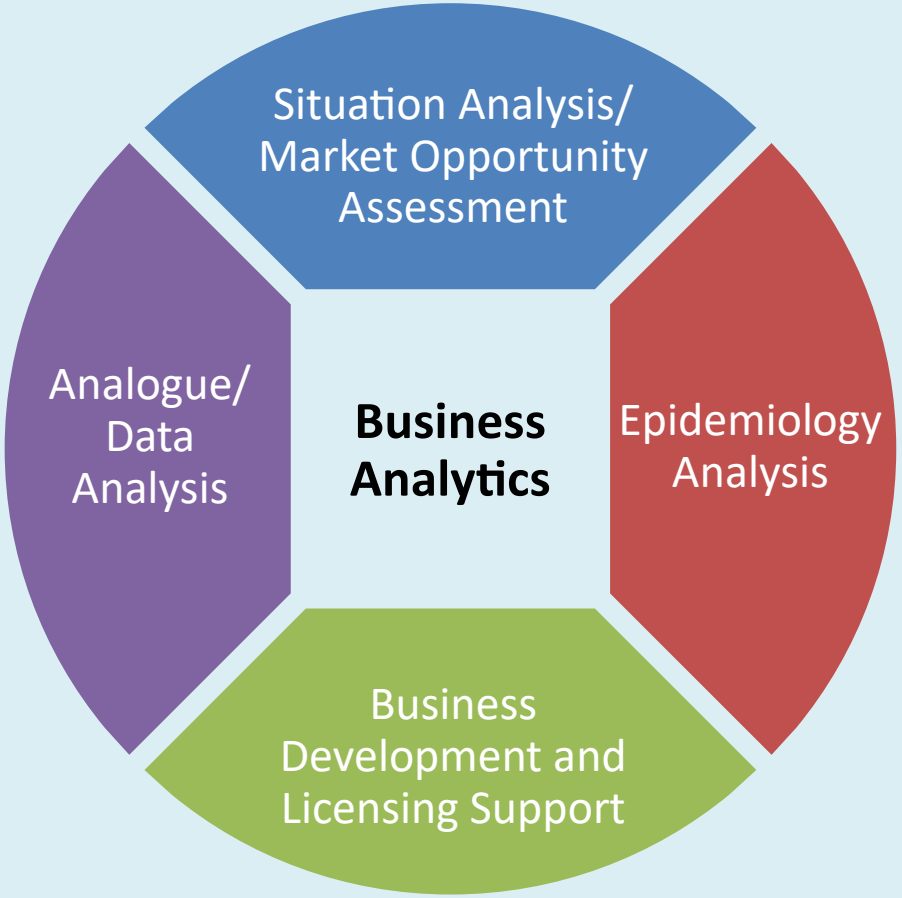
- GLG Qual Interviews
- InCrowd Mobile App- Microsurveys
- Olson Web based Surveys- Quant Research
- qualtrics Survey Platform



- tableau
- Qlik Sense
- Spotfire

BUSINESS ANALYTICS

Business Analytics covers various analysis frameworks to support specific business requirements

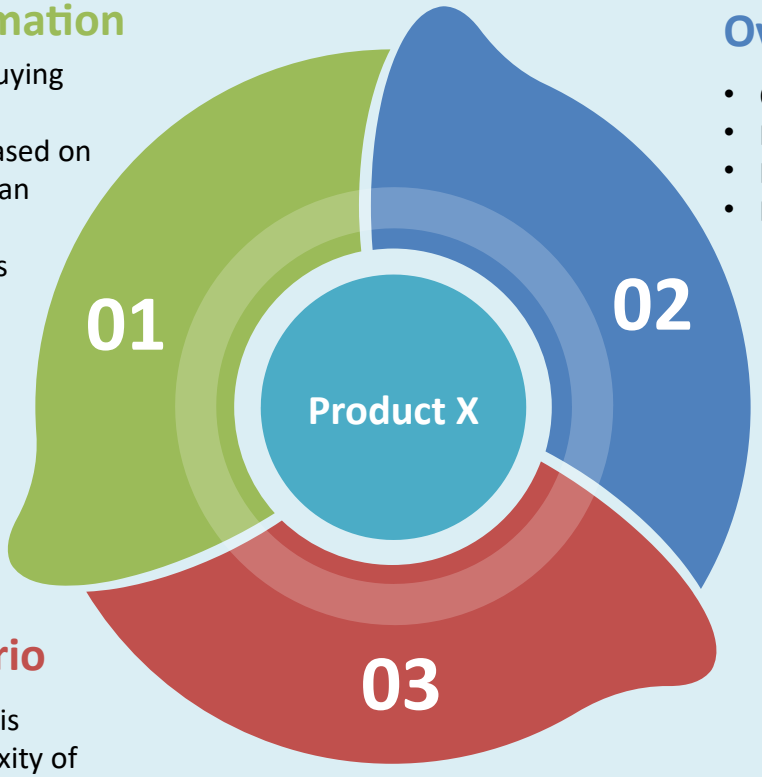


Some of your Need…	We Propose…
What is my market and how do I define it?	Market Assessment, Situation Analysis, Opportunity Analysis
How do I size of my market?	Patient Pool Estimation, Market Share Analysis, Benchmarking Analysis
Who are my direct and/or indirect customers? How do we differentiate them?	Epidemiology, Segmentation Analysis
Where will my product fit in?	Buying Process, Treatment Guidelines Analysis, TPP Testing, Unmet Needs Analysis
How do expand my portfolio/business??	Business Development and Licensing Forecasts, Opportunity Assessments

Opportunity assessment framework for new/existing markets provides in-depth insights on patients, access and overall market

Patient Potential Estimation

- Treatment, patient flow and buying process
- Patient potential evaluation based on epidemiology flow and physician acceptance
- Present management practices
- Unmet need analysis



Overall Market Scenario

- Overall Market Scenario
- Macro-economic scenario
- Healthcare and regulatory scenario
- Pharmaceutical market overview

Major Findings

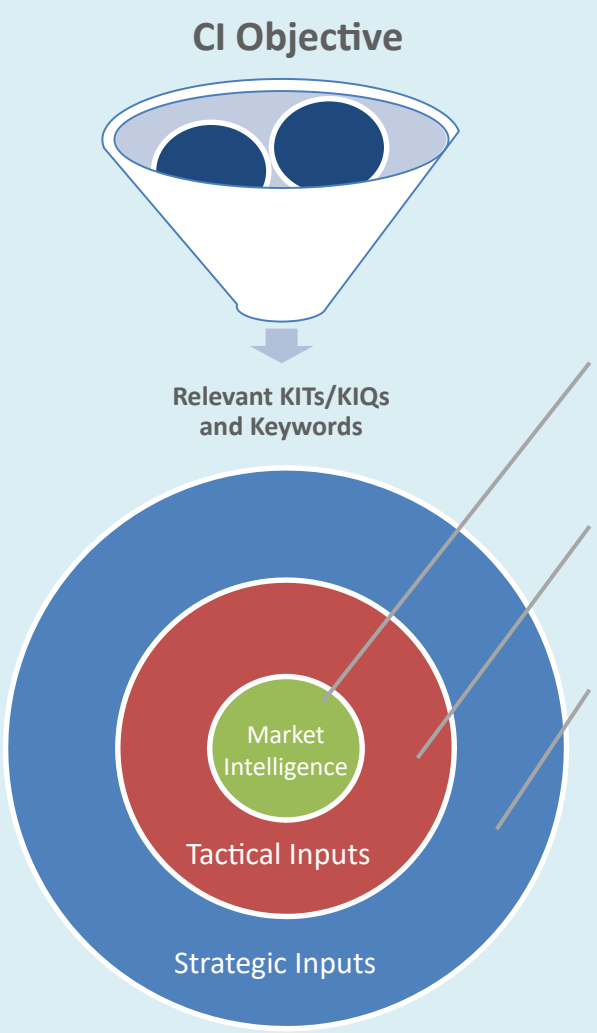
Marketing Entry Implications/Strategy

Market Access Scenario

- Innovator Competition Analysis
- Assess manufacturing complexity of product X
- Assess Potential Product X Inhibitor Threat

COMPETITIVE INTELLIGENCE

Our CI Delivery Model Bridges the Gap Between the "What" to "What Next"



Quick Updates on Key Market Developments

Identify Threats and Catalysts for Business

Market Trends Mapping for Strategic Options

Competitive Information (WHAT?)

Collecting information through diverse and most relevant data sources

Competitive Intelligence (SO WHAT?)

- Analyzing the information
- Collected to highlight:
  - Consistent patterns and/or anomalies
  - Implications, driving decisions

IMPACT derived through Intelligence (WHAT NEXT?)

Provides an early warning system

Helps validate various perspectives

Enables one to act and create an IMPACT!

SALES ANALYTICS

What we do ?

Portfolio Optimization

- Marketing Mix
- Life Cycle Management
- Pilot Studies For Portfolio Optimization

Sales Force Diagnostics

- Benchmarking Analysis
- Rep Performance
- Program Analysis

Sales Force Planning

- Sizing
- Structuring
- Segmentation & Targeting Rule Design

Sales Force Implementation

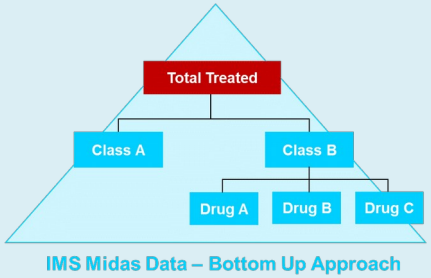
- Territory Alignment
- Physician Profiling
- Call Planning
- Business Planning

Sales Force Measurement

- Rep Performance
- Tracking Dashboards

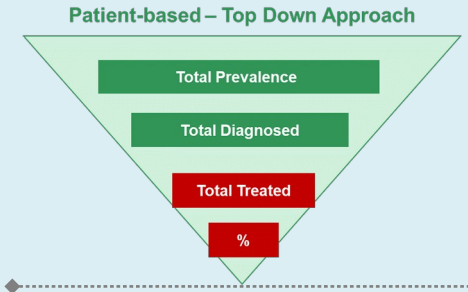
FORECASTING

Types of Forecasting we do



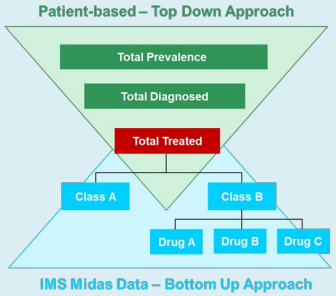
Demand Based Bottom-up Approach

- Purely based on demand data (IMS MIDAS)
- Involves projection of historical data and incorporating future events
- Usually appropriate for an in-line product forecast where you have sufficient historical data and the product is established
- Ensures accuracy grounded in demand data



Epidemiology Based Top-Down Approach

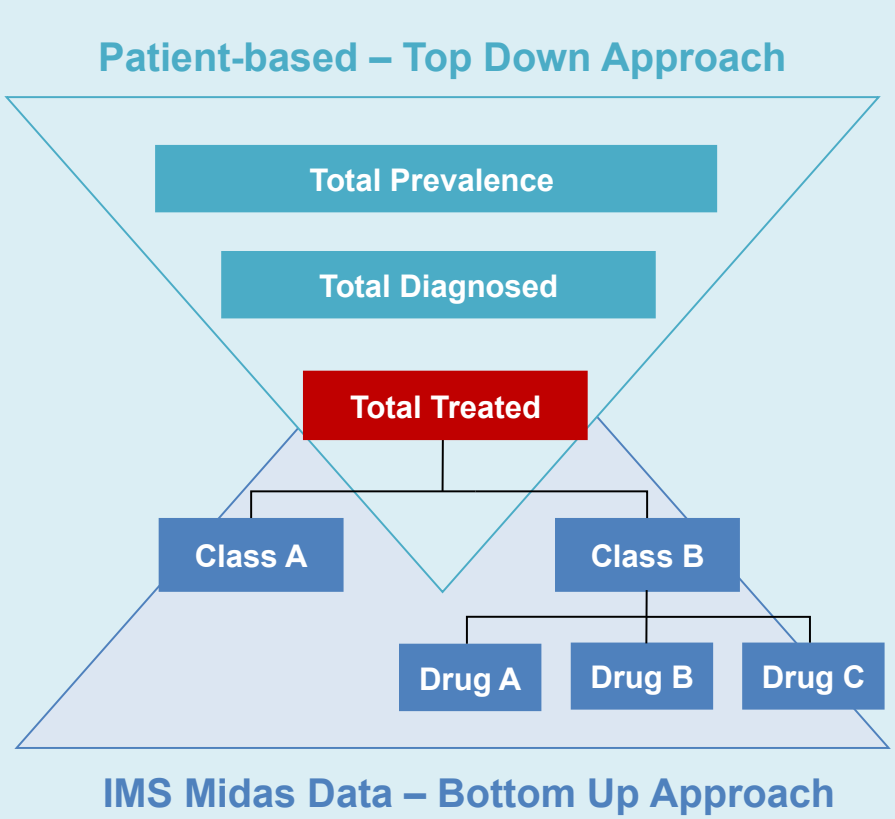
- Purely based on epidemiology data from secondary sources
- Appropriate for new product forecasting especially when a market is un/under-developed and there are not much existing products
- Captures the upside potential well as it looks at where the patient opportunity is; sets the strategic guidance

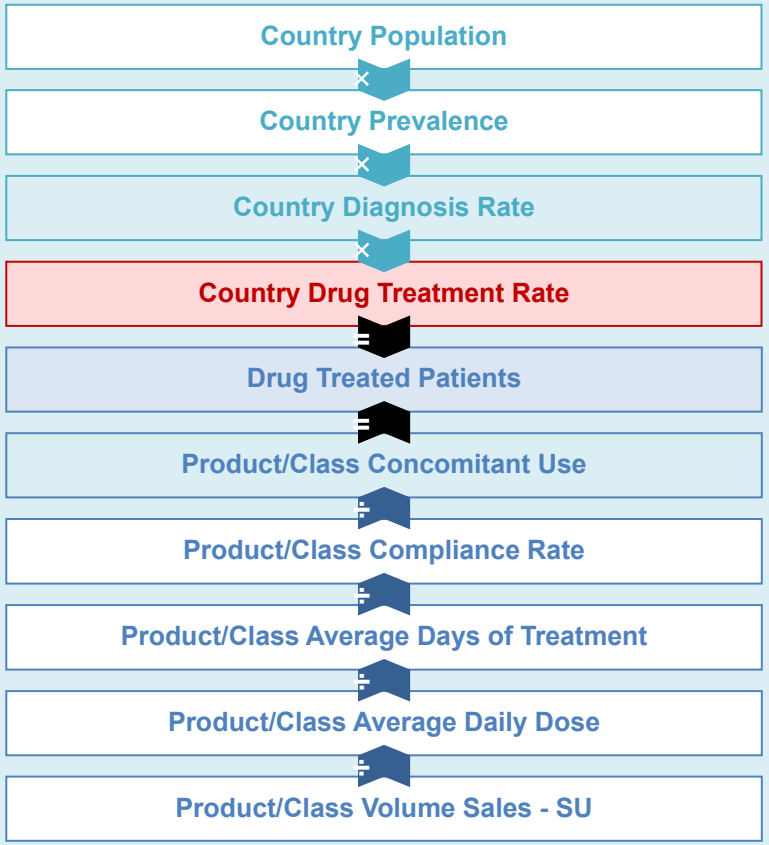


Combined Top-Down/Bottom-Up Approach

- Leverages the advantages of both approaches
- Demand data to ensure accuracy and market grounding; epi data to provide strategic patient opportunities
- Appropriate for modeling new and existing products but more importantly the total market context and source of business

Disease Insights Forecasts use combined approach





PERFORMANCE & REPORTING ANALYTICS

What we do ?

Data Type* (Source)

Sales Data	Prescription Data	Promotional Data	Patient Level Data	Pricing Data
(IMS MIDAS, GERS)	(IMS NPA)	(IMS Promotrack, Cegedim)	(AMR, IMS NDTI, Cegedim)	(IMS MIDAS)

Methodology

Step: 1 Data Mining → **Step: 2** Cleaning → **Step: 3** Integration and Validation → **Step: 4** Performance Reporting → **Step: 5** Performance Analytics (basic and complex)

Common methodology followed across objectives

Performance reporting and analytics results as standard reports/dashboards

- Sales KPI tracking
- Prescription data trends
- Promotional spend benchmarking/ tracking
- Pricing trends

- Marketing planning
- Promotional spend analysis
- Lifecycle management – pattern recognition and trending
- Forecasting support

Note:Analysis will be for ethical (prescription) market only.
**Data types and results mentioned are only examples and not a comprehensive list.*

CASE STUDIES

Case – Performance Analytics (1/2)
Market Dynamics Dashboard

Client Objective

The objective of the client (one of the leading pharmaceutical company) was to monitor the market dynamics of Parkinson's disease market and study the performance of its brand and its benchmarks vis-à-vis the market

Solution

Project team developed an excel based dashboard which depicts the performance of Client's brand and benchmarks vis-à-vis the market

Methodology

- Identify ATC classes, benchmarks, and the targeted market
- Extract IMS sales data (value and volume)
- Data processing, cleaning, and validation
- Create a dashboard depending upon the client's requirement and data format
- Quarterly update of the dashboard using the latest IMS data

Case – Performance Analytics (2/2)
Market Dynamics Dashboard

Sample Output 1

Select Territory: Greece | Select Time Period: Yearly | Select Parameter: Sales

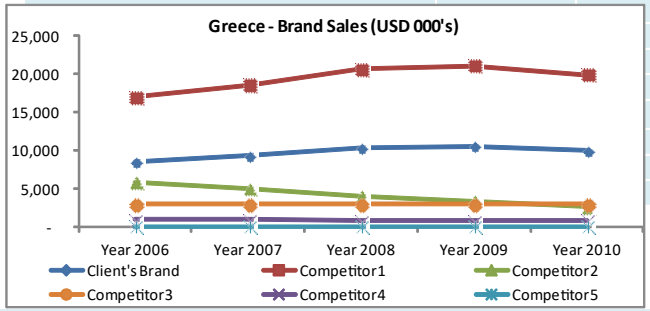
Greece - Sales (USD '000s)

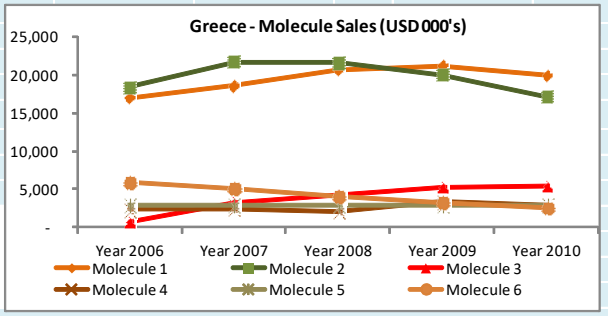
Print

	Year 2006	Year 2007	Year 2008	Year 2009	Year 2010		Growth vs. PY
Anti-Parkinson's Market	**51,811**	**61,122**	**63,090**	**62,292**	**56,766**		**-8.87%**
Molecule 1	16,961	18,533	20,650	21,080	19,893		-5.63%
Molecule 2	18,390	21,581	21,527	19,918	17,158		-13.86%
Molecule 3	740	3,295	4,261	5,272	5,464		3.64%
Molecule 4	2,342	2,415	2,057	3,324	2,912		-12.41%
Molecule 5	2,969	2,927	2,979	2,946	2,908		-1.30%
Molecule 6	5,889	5,050	4,039	3,316	2,620		-20.99%
Top 5 Brands	**20,903**	**22,351**	**24,420**	**24,766**	**23,678**		**-4.39%**
Client's Brand	**8,480**	**9,267**	**10,325**	**10,540**	**9,947**		**-7.72%**
Competitor1	16,961	18,533	20,650	21,080	19,893		-5.63%
Competitor2	5,889	5,050	4,039	3,316	2,620		-20.99%
Competitor3	2,969	2,927	2,979	2,946	2,908		-1.30%
Competitor4	973	891	791	740	877		18.53%
Competitor5	NA	NA	NA	NA	NA		NA

Top 6 Molecules

Note: Top 6 molecules based on the factored sales/volume are shown; All figures are in thousands (000's)





Case – Performance Reporting (1/2)
Launch Performance Benchmarking

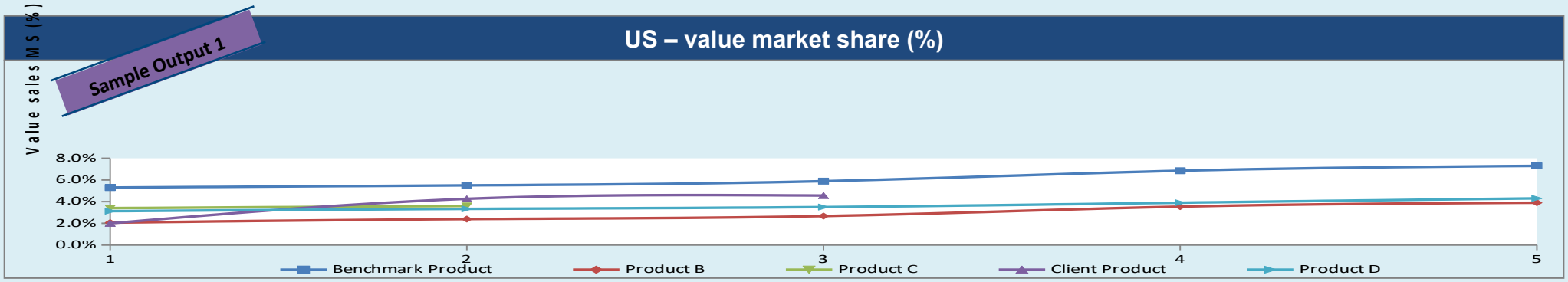
Client Objective
One of the top pharmaceutical company's objective is • To benchmark its newly launched product with competing brands across geographies during the first year of its launch • To monitor the sales performance of brand against the targeted sales for the latest month

Solution
• Monitoring sales uptake of newly launched product vs. its benchmark and other competitors • Monitoring performance of product against the targeted sales for the latest month • Tracking sales performance since launch for all defined geographies

Methodology
• Identify ATC classes, region and benchmark products in given therapeutic area • Extract IMS sales data (value and volume) • Data cleaning, validation and reporting by country • Analyse the monthly sales performance of product with targeted sales

Case – Performance Reporting (2/2)
Launch Performance Benchmarking

Sample Output 1



The graph above provides a comparative analysis of the sales uptake of client product vis-à-vis the sales uptake by other products during the first five months of the launch of each product. For instance, the client product acquired two percent of the market after one month of launch, while the benchmark product had acquired more than five percent after one month of its launch.

Sample Output 2

Sales performance of product against targeted sales across geographies

		Worldwide			Brazil			Switzerland			Germany		
Launch Date (mm-yy)					May-09			Oct-09			Oct-09		
December YTD (Internal data Monthly)		Actual	% var vs Target		Actual	% var vs Target		Actual	% var vs Target		Actual	% var vs Target	
3rd Party Sales (in 000's USD)	**vs Budget**	10,111,173	7.6%	▲	11,500	-17.2%	▼	9,859	7.0%	▲	6,891	-35.3%	▼
M&S Spend (in 000's USD)	**vs Budget**	219,907	-23.0%	▼	3,500	-3.2%	▼	518	5.0%	▲	5,120	-86.8%	▼

As emerging market, Brazil is leading in sales. However, it has not achieved the targeted sales for the current month

In Switzerland, brand has achieved 7% more sales vs. target for the current month

Case – Performance Analytics (1/2)
Generic Erosion – Impact Analysis

Client Objective

One of the leading pharmaceutical company required to get an overview on

- Loss of sales of their key product during first year of generic entry across different geographies
- Scenario of pricing trend of generics

Solution

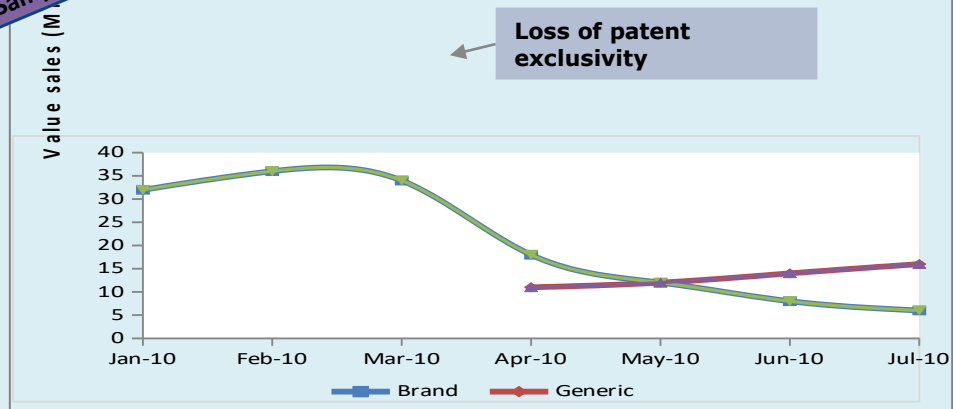
- Analyse the sales performance of both the branded and generic products in given therapeutic area
- Evaluate the impact of generic products' pricing on erosion of branded product

Methodology

- Identify ATC classes and targeted market
- Extract IMS sales data (value and volume) for all branded and generic products
- Data cleaning and validation
- Calculate and analyse the change in scenario of pricing (average price per SU) for both branded and generic products
- Analyse the sales trends of branded and generic products

Sample Output 1

Client Objective



During first month of patent exclusivity loss, generic drugs captured ~40% of the total market

Case – Performance Analytics (2/2)
Generic Erosion – Impact Analysis

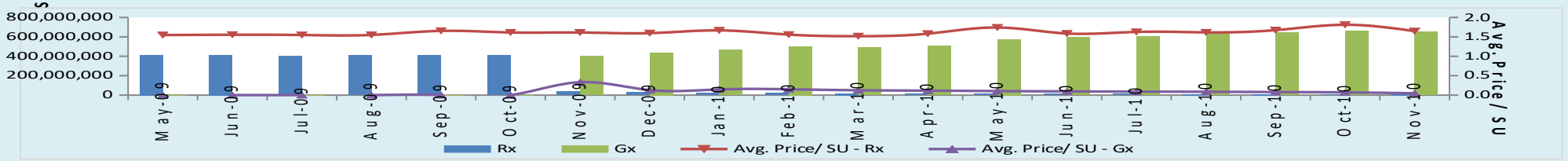
Sample Output 2

Gx/Rx Ratio during first year of generic entry

Molecule sales	Gx/Rx ratio	
	Last year of exclusivity	First year of generic entry
Mono molecule 'A' (Value)	**0**	**0.63**
Mono molecule 'A' (Volume)	**0**	**1.47**
Combo molecule 'A' (Value)	**0**	**0.51**
Combo molecule 'A' (Volume)	**0**	**1.24**

Sample Output 3

Pricing Dynamics – Impact on volume sales



The graph depicts a comparison for sales by volume and pricing dynamics of branded and generic molecule 'A'. During the first month of patent exclusivity loss, generic captures >90% of the market share with an average SU price which is 79% less then the branded price

Rx – Branded molecule 'A'; Gx – Generic molecule 'A'

Case – Performance Reporting (1/2)
Periodic Product Performance

Client Objective

One of the pharmaceutical company's objective is to track the performance of its product in the given therapeutic area on periodic basis across different geographies

Solution

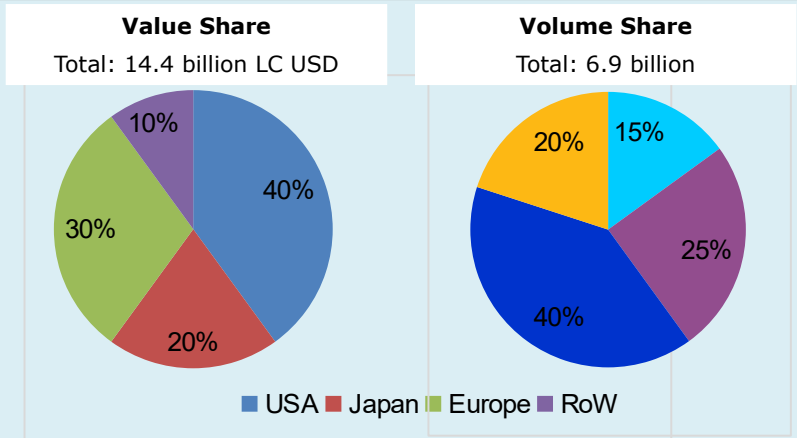
Periodically report the sales performance of identified products in the given therapeutic area

Methodology

- Identify ATC classes and targeted market
- Extract IMS sales data (value and volume) for all identified products and geographies
- Data cleaning and validation
- Report the sales trends of the products by time series and geography

Sample Output 1

Client's product Global market share (%) – Year 2009

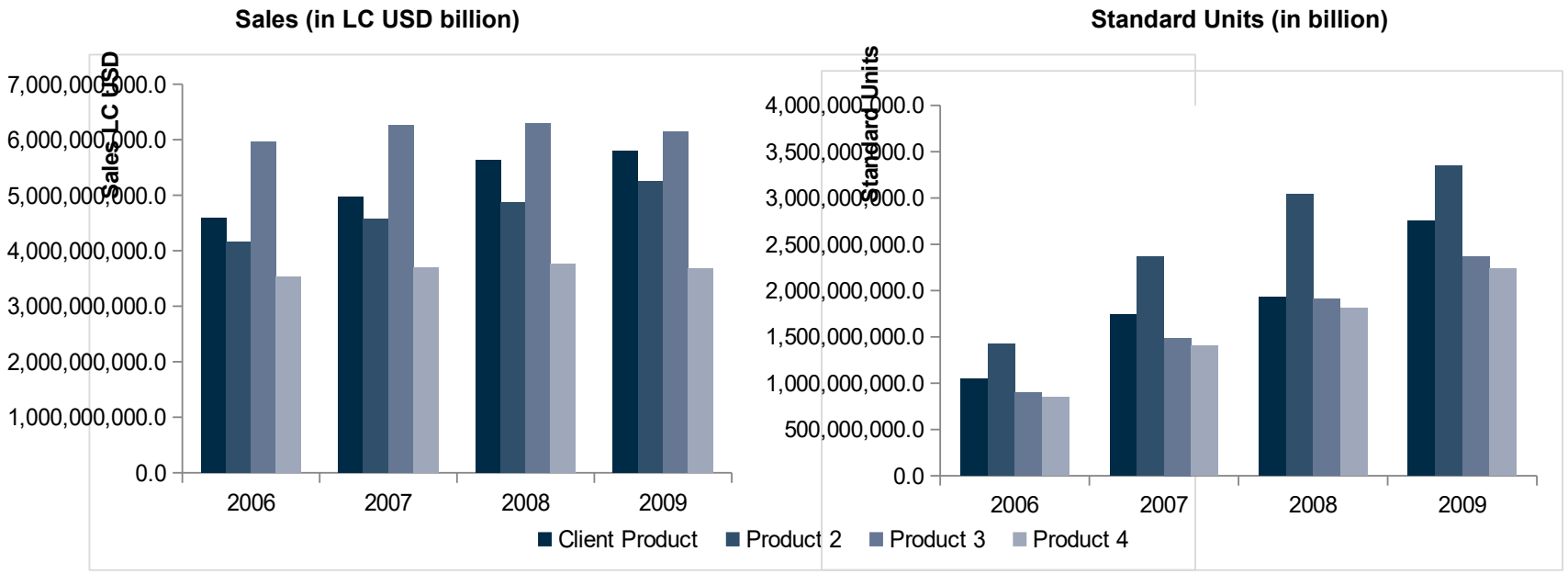


In year 2009, US leads the market by value with 40% MS whereas Japan leads by volume with 40% market share generating sales of 2.7 billion by volume

Case – Performance Reporting (2/2)
Periodic Product Performance

Sample Output 2

US – Sales performance by value and volume



- In US, client's product has sales of ~5.8 billion by value and growing with a CAGR of 8% during 2006-2009
- By volume, in year 2009 Product 2 has achieved sales of ~3,3 billion increased by 12% over previous year

SFE- Case Study 1: Segmentation of customers into five categories for ease of alignment, followed by account targeting

Background and objective:

A global pharmaceutical company wanted to segment the existing and potential customers and then realign the territories based on the customer segments. Key constraint was to maintain the high value customer segment with existing key account managers.

- Client had 6,000 existing target and expected us to categorize the customers into various segments for sales force call plan
- After segmenting the customers, allocating them to various key account managers was planned
- Along with the above, another ask was to ensure minimum disruption to the current sales force with high value customers retained by existing key account managers

Approach & Rationale

- Consulting A analyzed the customer universe and suggested metrics for targeting and segmenting the universe
- Then, customers were segmented into five categories based on product sales and untapped market potential
- We developed methodologies to derive the market index and untapped potential to calculate workload accurately
- Segmentation method was an agile approach with multiple iterations and customer feedback

Outcomes

- Consulting A provided customer universe along with:
  - Customer segments
  - Index potential of each customer
  - Workload per customer
- As a value add, we suggested to change the workload for high value accounts from 13 hours per week to 8 hours per week as it allowed better optimization of territories. This was done based on industry benchmark
- Key account segments were subsequently given as targets to field force, given that they represented 2/3rd of Total Market Opportunity and covered ~95% of current sales business

Why Consulting A?

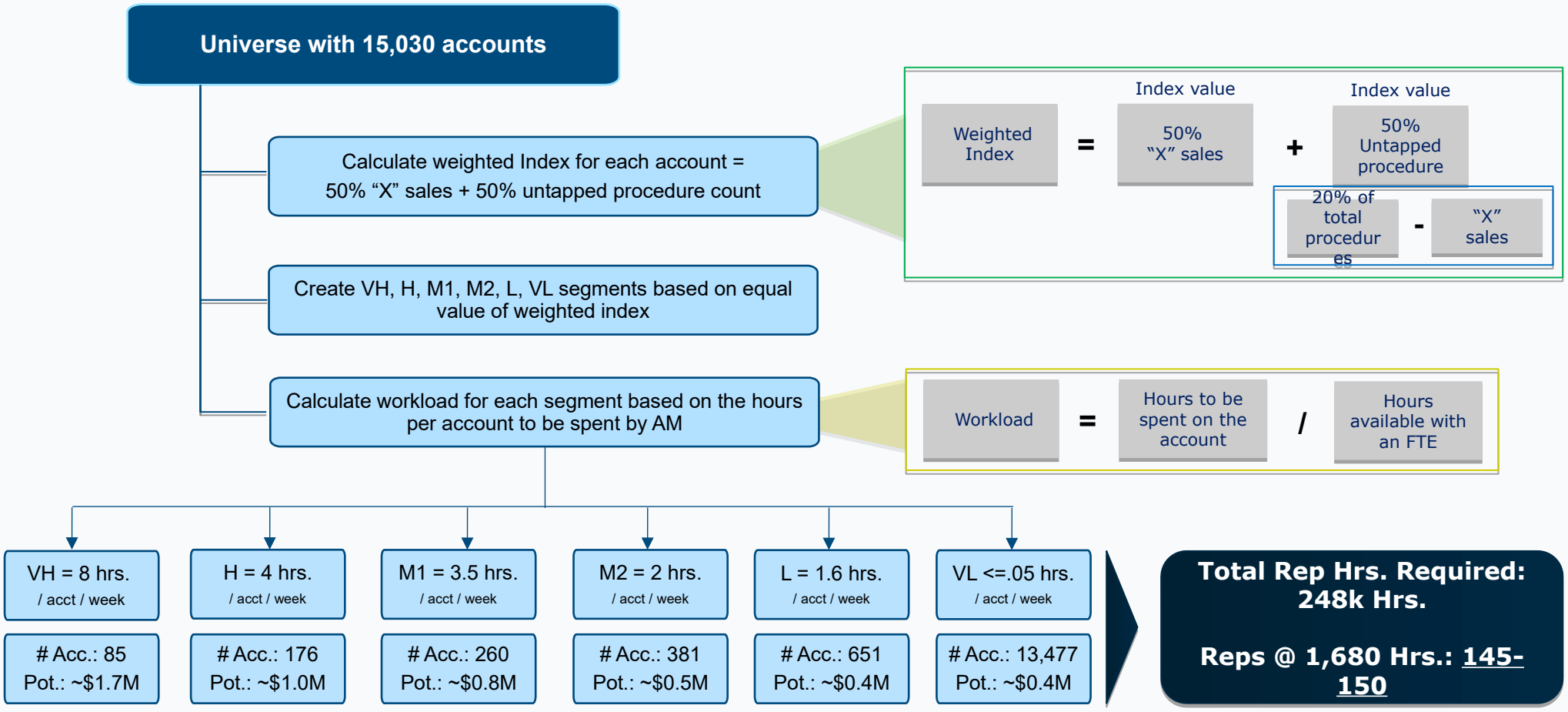
During our data analysis, we suggested that the customer universe is 14,000 rather than 6,000

The key segments, VH, H, M1, M2 & L were comprised on only 1,500 for the sales force of 150 key account managers to target in US. This number was appreciated greatly by leadership as it provided focus to the sales team

Rest of the 12,500 were segmented into VL1, VL2, & VL3, and were left to discretion of key account managers to make calls

VH: Very high; H: High; M1: Medium 1; M2: Medium 2; L: Low; VL: Very low

Case study framework: Customer segmentation for product "X" based on our framework



Considering 1 Vial = 1 Procedure count | VL segment consists of 3 sub-categories namely VL1, VL2 and VL3
Index value is specific account sales / total account sales | hrs./acct/week: hours per account per week | AM: Account Manager

Thank You

For more information, please call +91 98100 68241 or bd@thinki.in