S&P

Strategy & Performance

Life Sciences. Market Reality. Measurable Impact.

FROM SCIENCE TO MARKET IMPACT.

Turning deep insight into greater patient value and sustainable business performance.

PHARMA & BIOTECH

Great science alone does not create market success.

Between innovation and impact lies a complex reality that many organizations underestimate.



Same asset. Different reality.
The question is: Do you see the full picture?

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ICCBA® – REAL-WORLD CUSTOMER INTELLIGENCE WHERE DECISIONS ARE MADE

Point of Prescription / Recommendation / Adoption ("Point of Sale")

Not just expert opinion. Real-world perception where prescribing, recommendation and adoption actually happen.

Traditional Expert Formats

- focus groups
- KOL / professor opinions
- strategic expectations
- valuable – but not sufficient

VS

ICCBA Real-World Intelligence

- daily prescribers
- recommenders
- users
- real market behaviour

Don't ask only those who explain the market. Ask those who actually make the market.

Traditional focus groups with professors, KOLs, and top experts are useful, but they can be misleading if they are treated as market reality.

ICCBA Proprietary Real-World Performance Tool

What really matters is how real prescribers, recommenders, and users perceive the client/brand versus competitors in daily clinical practice.

ICCBA captures that real-world customer perception and translates it into **management action.**

INTRINSIC PERFORMANCE

Product / brand perception

up to ~80 tailored questions

- medical benefit
- efficacy
- safety
- innovation
- differentiation
- usability

ONE ASSESSMENT. UP TO 8 COMPARATORS.



EXTRINSIC PERFORMANCE

Company / service perception

up to ~80 tailored questions

- medical affairs
- scientific communication
- field force
- services
- customer orientation
- company performance

Up to 6 HCP Groups

Reference design: n ≥ 40 per group

Office-based specialists | **Hospital specialists** | **Subspecialists** | **High-prescribers** | **Clinical decision-makers** | **Other target HCP groups**

Simultaneously assessed, where operationally feasible. | *Separately analyzed, where strategically relevant.*

Each participating HCP evaluates the client/brand and all included comparators within the same assessment.
This creates a differentiated and directly comparable customer-perception profile across competitors and HCP groups.

CONTROLLED ON-SITE ASSESSMENT

identity check | individual codes / QR | standardised tablet workflow | start / resume | pseudonymised analysis | ~3 hours

Share of Voice & Resources → **Market Performance / Market Shares** → **Customer Quality Perception**

Individual questions › clusters › segment profiles › competitive profiles › strategic priorities

THE MISSING LINK

ICCBA reveals how real-world customer perception translates market activity into competitive outcomes.

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ICCBA® - THE MISSING LINK BETWEEN MARKET ACTIVITY AND MARKET PERFORMANCE

Pharmaceutical companies know their market activities, investments and market shares. What is often missing is reliable information on how the product and the company are actually perceived by relevant customers in direct comparison with key competitors.

THE THREE MANAGEMENT DIMENSIONS

SHARE OF VOICE & RESOURCES

Market engagement · Communication · Medical & Commercial Activities · Resource allocation

MARKET SHARE GAINED / LOST

Market position · Market-share development · Competitive dynamics

CUSTOMER QUALITY PERCEPTION

THE MISSING LINK

How do relevant customers actually assess product and company — and how does this perception compare with competitors?

ICCBA DOES NOT MEASURE IN ISOLATION - IT COMPARES.

- The client and its brand are at the center of the assessment.
- Within the same assessment, the client/brand is evaluated against up to eight relevant competitors or comparator brands.
- Crucially, each participating healthcare professional evaluates the client/brand and every included comparator using the same questions and evaluation criteria.
- This creates a complete within-respondent competitive comparison for every participant.

CLIENT / BRAND *versus* **COMPETITOR 1 · COMPETITOR 2 · COMPETITOR 3 · COMPETITOR 4 COMPETITOR 5 · COMPETITOR 6 · COMPETITOR 7 · COMPETITOR 8**

TWO PERSPECTIVES - ONE INTEGRATED COMPETITIVE POSITION

INTRINSIC PERFORMANCE

Product-related perception

- Medical benefit
- Efficacy
- Safety
- Innovation
- Usability / ease of use
- Clinical differenitation
- Other product-specific performance dimensions

EXTRINSIC PERFORMANCE

Company-related perception

- Medical Affairs
- Scientific communication
- Field force
- Services
- Customer orientation
- Company performance
- Other relevant performance dimensions

ICCBA combines both perspectives into an integrated relative competitive position.

TARGET GROUPS

Up to 6 relevant HCP groups: office-based specialists · hospital-based specialists · subspecialists · high-prescribers · clinical decision-makers · other project-specific groups

S&P reference design: up to 6 HCP groups × n ≥ 40 per group · total N ≥ 200

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FROM CUSTOMER PERCEPTION TO MANAGEMENT ACTION

ICCBA does not end with a survey. The analysis systematically translates individual ratings into a strategic management diagnosis.

ANALYSIS CHAIN

1. **Individual Questions**
2. **Clusters**
3. **Intrinsic / Extrinsic Performance**
4. **Integrated Competitive Position**
5. **Strengths • Weaknesses • Competitive Gaps**
6. **Priorities for Management Action**

STATISTICAL POWER THROUGH THE COMPARATIVE DESIGN

- ICCBA's statistical strength comes not only from sample size, but from the paired / within-respondent design.
- Each participating HCP evaluates all included competitors personally.
- The same respondent therefore serves as his or her own reference in direct competitive comparisons, reducing between-person noise versus separate respondent groups.
- This increases the statistical efficiency and precision of relative competitive comparisions.

S&P reference design: up to 6 HCP groups × n ≥ 40 per group = total N ≥ 200

Final statistical power is determined and confirmed before project start based on expected effect size, variance, number of comparisons and planned subgroup analyses.

CURRENT POSITION → PRIORITY LEVERS → FUTURE POSITION

1 | CURRENT POSITION

Where does the client stand today?

- Which product and company-performance dimensions are evaluated better or worse than competitors?

2 | PRIORITY LEVELS

Which perception differences are strategically relevant?

- Where are resources already being translated successfully into perceived quality?
- Where is there a gap between resource input and customer perception?

3 | FUTURE POSITION

Which performance areas should be changed with priority?

- Which actions have the greatest potential to improve the future competitive position?

ICCBA measures current perception and provides the evidence base for future strategic positioning.

AI-ENHANCED ANALYTICS - SENIOR-LED INTERPRETATION

AI-SUPPORTED

- Data validation
- Plausibility and consistency checks
- Pattern recognition
- Cluster analysis
- Competitive comparisons
- Identification of relevant deviations

SENIOR-LED

- Medical interpretation
- Assessment of clinical relevance
- Strategic interpretation
- Competitive diagnosis
- Derivation of concrete management options

AI accelerates the analysis. Senior expertise determines what it means.

THE RESULT: Where do we stand compared with our competitors - why are we there - and which performance areas must we change to improve our future position?

We connect what organizations often manage separately.

An integrated view. One consistent strategy. Measurable impact.



Medical, CME & Field Force.

Science. Engagement. Compliance. Impact.

We turn scientific value into meaningful customer engagement — fully compliant and commercially relevant.

CME & Medical Education

- Relevant scientific content
- Accredited formats
- HCP value and trust

Field Force Excellence

- Right customer
- Right message
- Right channel
- Right frequency
- Right resource



Compliant Execution

- REG, country and local compliance
- Medical-Legal-Commercial alignment
- Omnichannel integration
- Continuous quality management

Not more activity. More productive activity.

ICCBA®

SEE WHAT MANAGEMENT CANNOT SEE.

Objective reality
does not tell the whole story.

Customer perception
reveals the hidden drivers.

ICCBA® turns both into
clear priorities for action.



OBJECTIVE REALITY

- Clinical data
- Market data
- Competitive landscape
- Internal assumptions

CUSTOMER PERCEPTION

- HCP beliefs & behavior
- Unmet needs
- Barriers & misconceptions
- Emotional & contextual drivers

ICCBA®

Intelligent Customer & Brand Analysis

1. Hidden Decision Drivers
2. Strategic Priorities
3. Management Action

A clearer view.
Better decisions.
Greater impact.

From Pre-Launch to Sustainable Performance.

We enter where value is at risk — and create momentum.



Different challenges. One integrated approach.
Always with a focus on measurable value.

From insight to action — and measurable value.

We help you allocate resources where they create real impact for patients, customers and your business.

EVIDENCE
Scientific & real-world

ADOPTION & MARKET PERFORMANCE
Prescriptions • Share
Access • Lifecycle

CUSTOMER INSIGHT
ICCBA® – what really drives decisions

FROM SCIENTIFIC VALUE TO ECONOMIC RETURN.

STRATEGIC PRIORITIES
Where to play
How to win

HCP VALUE
Better informed
Greater trust
Stronger engagement

RESOURCE ALLOCATION
Focus people, budget and channels

COMPLIANT EXECUTION
Medical & CME • Field Force • Omnichannel

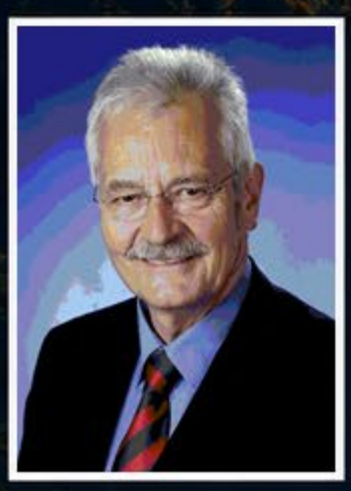
Sharper Decisions | Stronger Positioning | Better HCP Engagement | Reduced Launch Risk | Sustainable Market Performance

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Life Sciences. Market Reality. Measurable Impact.

LET'S TALK ABOUT YOUR NEXT VALUE INFLECTION POINT.



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SAME SCIENCE.
A CLEARER VIEW.
A STRONGER TOMORROW.