

Market Access in Pharma.

How to manage internal collaboration
and alignment across the globe.

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As Market Access becomes more and more important for launch success in pharma and biotech, many companies struggle to integrate all the relevant internal stakeholders and coordinate efforts across their affiliates and global units. [1] Campana & Schott supports customers as an expert in collaboration, knowledge management, and project execution in Market Access.

Introduction

The increasing focus on rare diseases and the shift towards biologics have put Market Access units at the center of launch strategies and created a need for Access Excellence. Targeted patient populations for innovative drugs are smaller and prices higher while public health care systems face limited resources in an aging society. [2]

Pharmaceutical and biotech companies feel pressure from local authorities, Health Technology Assessments (HTA), and reimbursement bodies not just in price negotiations but also to provide convincing data on added value. Not only do they have to differentiate themselves from intense competition, but they also are required to prove their claims with clear data before and beyond the launch. Furthermore, cross-country linkages through international referencing eventually to be joined by the US, the joint HTA framework within the EU or digitally enabled networks are forcing manufacturers to align their internal activities globally. [3]

Thus, Market Access is no longer a processing unit, transforming a marketing authorization with the help of health economic models into HTA and reimbursement submissions. It becomes a leading interface that influences clinical development, regional commercial activities, patient engagement, and post-launch compliance.

As needs have evolved over years, Market Access as a function interacts with more and more different internal and external stakeholders. The company's Market Access departments differ in their level of centralization but mostly have a strong spearhead in the US. Local access activities of international markets

must not risk the launch success or price levels in key markets or adjacent affiliates. Globally developed access strategies try to guide and frame regional and local activities, however leading to a complex program situation.

The emergence of new markets has brought about new characteristics and dynamics for Market Access emphasizing the need for strong local relationships, innovative approaches to pricing or creative access partnerships. [4], [5]

The digital transformation of the Market Access environment and the continuous cross-functional collaboration is commonly accepted in theory. However, the actual engagement, the adoption of new behaviors, and the creation of real impact with value for the organization are often hard to achieve.

Therefore, five main future challenges for Market Access can be identified:

- **Early Market Access involvement in global product teams** and with cross-functional partners to integrate access needs and align strategies
- **Integration of global and local interests** to balance affiliate's access needs with global guidance and align strategies of key markets
- **Capability Building** to ensure excellence of global and local access champions and build a fundamental and unique understanding of Market Access within the organization
- **Knowledge and document management** alongside global, regional, and local access stakeholders with high transparency, data availability, single sources of truth, and strong adoption, always considering confidentiality requirements
- **Project management excellence** for goal-oriented execution of projects and effective alignment of timelines, stakeholder needs, and strategic decisions within the portfolio

Access Excellence

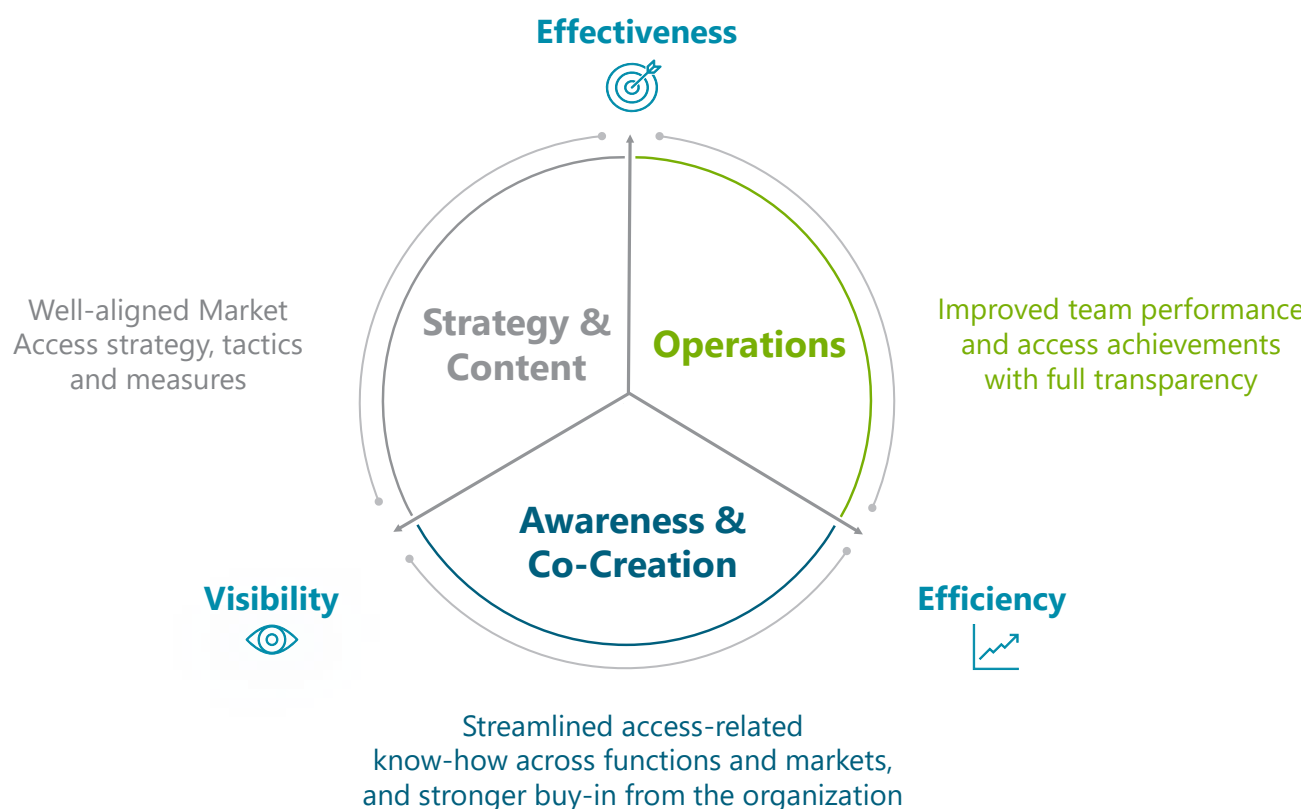
Addressing organizational challenges is the foundation on which launch success and long-term growth can be built. Companies need to shape targeted and integrated processes, a culture of collaboration and transparency, and a value-oriented mindset to achieve an excellent organization in Market Access.

Access Excellence Benefits

Campana & Schott recommends focusing on three dimensions of Access Excellence:

- Strategy & Content
- Operations
- Awareness & Co-Creation

Achieving excellence in these three dimensions leads Market Access organizations to benefit from higher effectiveness, efficiency, and visibility (see Figure 1).

**Figure 1:**

Three dimensions of Access Excellence to realize benefits

Access Excellence Capabilities

To achieve Access Excellence, all three dimensions must be addressed. Campana & Schott defines three must-have capabilities for each area.

Strategy & Content

Integrated strategy, tactics & measures for pipeline and launch assets: A comprehensive access strategy on the global as well as the local level is the backbone for a successful launch and sustainable long-term efficiency. A global access strategy needs to guide sub-strategies such as health economics and outcome research, pricing, or patient advocacy to build an integrated Market Access Plan for global assets. Beyond the coordination within the access department, the strategy needs to fit into the organization's strategy and connect to clinical, medical, and commercial requirements. Campana & Schott supports clients in structuring their strategy integration and with well-structured and widely established collaboration tools that ease and sustain these processes.

Consistent asset portfolio planning and prioritization:

Launch success closely coheres with the ability to convince authorities and decision-makers of the drug's added value. As health care systems, HTA structures, and payer archetypes differ across countries, visibility and transparency about local needs are the basis to build an integrated evidence strategy and close evidence gaps proactively and in a globally coordinated manner. Focus and portfolio prioritization are crucial for allocating limited internal and financial resources efficiently. Digital platforms and dashboards can unlock data-driven and comprehensible decision-making, thus optimizing the go-to-market time for the most valuable assets.



Figure 2: Capabilities to achieve Access Excellence

Training & Access Capability development: There is a clear need to train staff within Market Access to achieve Access Excellence. Besides having the right attitude and mindset, an Access team member needs to be an expert in their field and develop proficiency in strategy building, negotiating, or storytelling. However, the full potential of cross-functional as well as cross-country alignment can only be unlocked if stakeholders have a fundamental understanding of the processes, requirements, opportunities, and challenges of Market Access, too. Internal training, roadshows, and exchanges are important to educate employees outside the Market Access unit on access needs or gaining understanding between global, regional, and local entities. It's good practice to enhance these efforts with Change Management expertise and tools.

Operations

Aligned needs and goals across organization: The global strategy of Market Access needs to reflect the local needs of affiliates and be synchronized with their organizational objectives. Establishing and maintaining a close collaboration between global and local access stakeholders is the key for successful coordination. Well implemented and adopted operations enable a culture of collaborative strategy deployment. Joint workshops and the use of affiliate visits can support long-term alignment. **Market access-significant KPIs:** Operational excellence should be supported by KPIs enabling data-driven decision making, progress tracking, and maintaining strategic course. KPIs should be derived from the access strategy and benchmarks should be aligned with the company's vision. Furthermore, well defined KPIs can support key results as a performance measurement tool. Effective usage requires clear communication, reporting, and continuous improvement.

Digital mindset & working style: Not only since the pandemic-related emergence of New Work has Market Access been characterized by the need for cross-functional and cross-location collaboration. Collaboration via digital platforms is a critical time-saving factor. Although the digital enablement of employees has shifted to a much higher level over the past years, many access organizations struggle to establish a unified digital culture, with common digital behavior, single sources of truth for document or knowledge management, or the usage of easy-to-build business apps for process automation and acceleration. It is key to empower employees to be able to handle new digital opportunities, allowing them to focus on value creation for patients and the organization.

Awareness & Co-Creation

Joint problem-solving abilities: Co-creating innovative solutions for access challenges across functions and geographical levels is an effective way to achieve full and proper collaboration. Campana & Schott enables clients with design thinking workshops to develop new customer-centric strategies or to gather new insights from the markets. Furthermore, well-facilitated access communities can foster synergy-seeking and organizational learning.

Organizational positioning of Market Access: Building trust with internal partners and creating an open mindset for Market Access in the organization is crucial for enabling collaboration. Cross-functional stakeholders need to have a clear idea of Market Access impact and achievements to understand the value for the organization. It is important to share results and successes on a regular basis and through multiple channels. Access organization might include partners in Market Access townhalls or summits, and actively participate themselves in similar formats of clinical, regulatory, commercial, or legal departments. It is equally important for Access teams and their partners to celebrate successes and milestones openly and with high reach. Embedded customer centricity: Partner with stakeholders from various affiliates and regions and their patient groups, HTA bodies, Key Opinion Leaders, and payer organizations, in order to build a compelling picture of their local evidence and access needs. Ensure that this information is known throughout the organization and that asset strategies incorporate it to achieve broad and fast access. Automation and AI-capabilities can be leveraged to gather publicly available data, e.g., from HTA-platform, scientific publications, or clinical trial databases.

Conclusion

Market Access represents the moment where the great efforts and successes of research and clinical development are translated into real value for patients and subsequently for the organization. Losing track within this area means reaching fewer people than possible with the company's solution.

Setting the scene for a culture of collaboration and a mindset of success is the strong purpose when building the organizational foundation for Access Excellence. It is crucial to leverage the tools and tactics of change management and capability building to engage all employees and key stakeholders. Digital platforms will be the future backbone for all interactions, engagements, and decisions to be made.

Whether companies are trying to optimize your up-and-running Market Access units or just starting to build a global, regional, or local department for Market Access, Campana & Schott supports you with expertise and well-proven best practices.

Our experts



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Passion for collaboration.

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