

THE ZITTER GROUP

## Market Research

90 New Montgomery Street  
Suite 333  
San Francisco, CA 94105

*phone* 415.547.1000  
*fax* 415.547.1001

33 Bleeker Street  
Suite 200  
Millburn, NJ 07041

*phone* 973.376.1300  
*fax* 973.376.1358

*e-mail* [MCMM@zitter.com](mailto:MCMM@zitter.com)  
*web* [www.zitter.com](http://www.zitter.com)

# ***Managed Care Message Monitor***

# **Product Prospectus Fiscal Year 2009**



## EXECUTIVE SUMMARY

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Private payers are responsible for controlling over 75% of all prescriptions in the US since the inception of the Medicare Part D program. This level of influence makes understanding payer relationships more important than ever. Marketers communicate with managed care organizations largely through payer field representatives, who are armed with specific messages regarding diseases, products, and/or companies. Monitoring these messages on an ongoing basis is difficult and usually consists of anecdotal feedback from those delivering the messages. Thus marketers have little reliable data on whether their messages are being delivered, believed, and acted upon. They have even less visibility into the details and impact of competitors' messages.

The Managed Care Message Monitor (MCMM) is an ongoing survey of payer decision makers reporting payer descriptions and perceptions of visits by biopharmaceutical representatives. Clients are provided real-time data from 100-125 payer respondents who are responsible for managing drug therapy and serve as the point of contact for industry account managers. These data are provided to sponsors through a Web-based platform, allowing marketers access to real-time respondent information on messages and their effectiveness, along with details on the account management experience.

Though there are many tools to assess sales representative activity and effectiveness when calling on prescribing physicians, there are few resources of this magnitude that provide similar feedback in managed markets. The MCMM enables you to:

- Monitor payer perceptions of your company's positioning/brand vs. competitors'
- Track messages being delivered by your company staff and competitors
- Determine the credibility and impact of the messages payers hear from pharmaceutical manufacturers, allowing you to compare the effect of your messages vs. those of competitors
- Identify the managed care selling strategies competitors are using to compete with your company and its key products
- Pinpoint the payer hot buttons related to your products and the most effective strategies to address them
- Quantitatively assess the effectiveness of your account managers vs. competitors'
- Understand the details of a typical payer account management visit (participants, regularity, subject matter, and length)

The Zitter Group has developed the largest network of payer professionals, with over 180 leading payers managing more than 165 million covered lives. This infrastructure serves as the foundation of MCMM, providing the volume needed to generate reliable market insight.

## PRODUCT DESCRIPTION

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The MCMM is an interactive database that tracks, stores, and analyzes data entered by payers throughout the U.S. based on visits by pharmaceutical staff.

### STANDARD FEATURES:

- Provides real time, Web-enabled access to results from longitudinal data supplied by 100-125 payer decision makers throughout the country on messages delivered by pharmaceutical representatives
- Reports on five areas:
  - Details of messages
  - Credibility of messages
  - Actions payer is likely to take, if any, due to each message and overall visit
  - Visit characteristics (e.g. purpose, length, staff titles attending, use of tools)
  - Account manager feedback
- Rolls up results for easy analysis and data cuts by manufacturer, category, or product
- Allows customizable queries by a variety of specific criteria
- Provides real-time charting of important data sets with easy download for presentations

### MESSAGE MONITORING METHODOLOGY:

- Evaluates messages for credibility, relevance, and effectiveness, beginning with open ended (unaided) questioning. Respondents then are prompted with specific messages known to exist in the market to see if they recall hearing them. If so, respondents rate those messages using the same criteria
- Provides insights into payer recall of messages through comparison of unaided and aided plus evaluation of the impact of these messages
- Prescribed Messages will be assigned a specific number and unaided recall messages will be compared to Prescribed Messages

### ACCESS TO DATA:

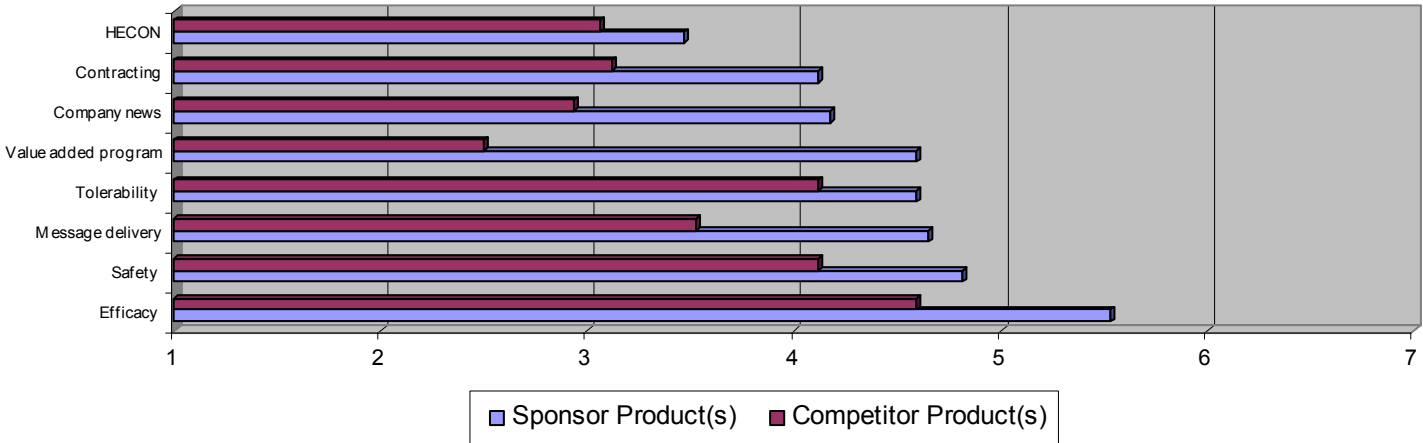
- Clients will have access to general data regarding visit profiles along with access to comprehensive information for the sponsored therapeutic category(ies) including: activity, messaging, and visit outcomes for representatives from both their own and competing companies

# SAMPLE DATA AND ANALYSES

## SUBJECT MATTER OF VISITS

**Q. Please answer the following questions related to the frequency of topics discussed in typical biopharmaceutical manufacturer visits where 7=Very frequent, 1=Not frequent at all**

n=20



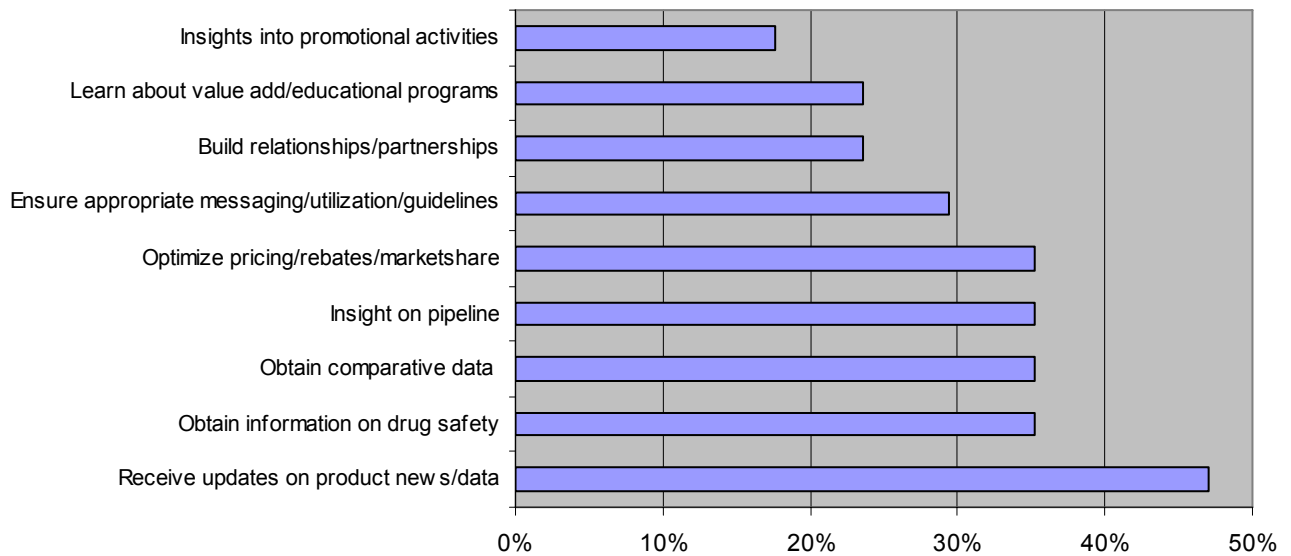
## RESULT OF VISITS

7=Very frequently, 1=Never

n=20	Mean	Mode
Q. How often does a meeting translate to a change in the way you manage a category or product?	4.4	5.0

**Q. What are the top 3 things you look to achieve by meeting with manufacturer representatives? (Check all that apply)**

n=20



**MESSAGE LEVEL ANALYSIS – INDIVIDUAL UNAIDED RESPONSES**  
**(Fictitious data)**

Example 1: “GLP-1s have better efficacy than OADs” - **National Medical Director**

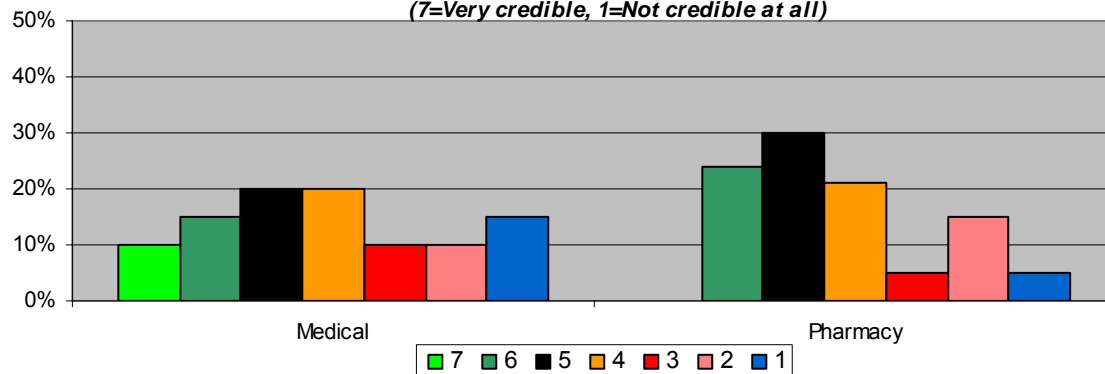
Example 2: “Remicade has a higher compliance rate than injected TNFs” - **Regional Pharmacy Director**

Example 3: “Serono has invested in significant MS pull through programs” - **Pharmacy Director**

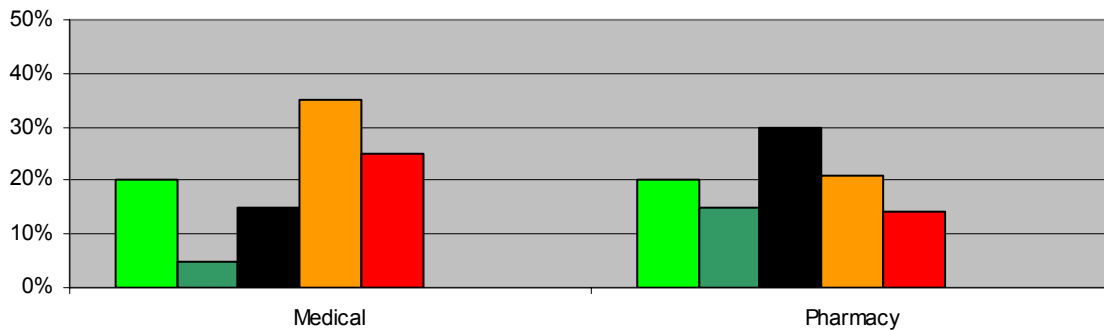
**MESSAGE LEVEL ANALYSIS – CORRESPONDING AGGREGATED AIDED RESPONSES**

**GLP-1s offer the greatest reduction in HbA1c**

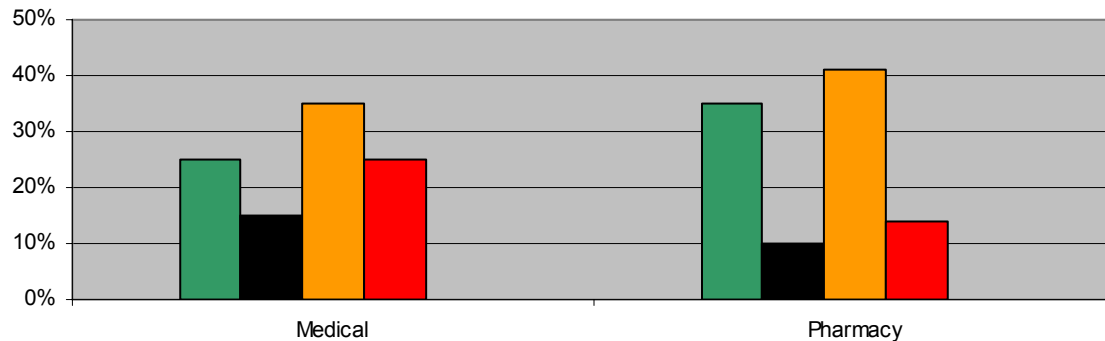
*Data reflects payer respondents who heard mention of the product message  
 (7=Very credible, 1=Not credible at all)*



**The enhanced compliance with Remicade results in lower failure rates and higher efficacy than self injected TNFs**



**Serono's field force has proven its ability to drive share in the interferon category**



## KEY BENEFITS

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The MCMM offers significant insight into the value assigned by payers to a company's products, activities, and services. The value of the payer visit is measured by ongoing, longitudinal perceptions of payers who are being visited by manufacturers. The MCMM is applicable to multiple levels of the payer marketing and sales teams:

### **Managed Care Marketing**

- Quantifies message effectiveness and resonance
- Monitors competitive messaging and impact
- Assesses company-wide branding messages/programs

### **Brand/Product Management**

- Allows for quantitative analysis of payer messaging and relationship management
- Compares payer messages specific to a product or therapeutic area
- Demonstrates likely impact of messages
- Identifies competitor messaging and its impact

### **Market Research**

- Provides primary research data on messages related to market dynamics such as new entrants, emerging data, or other substantial changes
- Increases reliability of results through large sample size
- Enhances accuracy by having respondents provide immediate recall data rather than expecting them to remember details up to six months post-visit
- Reduces or eliminates the need for expensive custom studies

### **Managed Care Account Management**

- Monitors changes in the account management landscape over the duration of the subscription, with daily refreshes of data
- Educates users on payer perceptions of visits and compares other manufacturer account managers' effectiveness
- Provides early warning of competitive threats, including targeted messages and contracting strategies

## DELIVERABLES AND TIMING

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- Sponsors will receive immediate access to current and legacy payer information and will be assigned a Zitter Group account representative to help guide use of the tool
- Subscription period is for 12 continuous months once data become available. Note: some therapeutic areas may require lead time.
- Data collection for the MCMM will launch in Q3 2009, with data ramping up for the first 6 months. Clients will have limited access to data until the end of Q3/early Q4

*Note: volume of data at the therapeutic level is proportional to the number of visits related to a given product; thus product-specific data set sample sizes may vary among products based on the amount of field force support for given products during their respective promotional time periods. There are no minimum data guarantees.*

- Charter clients will be given preferential pricing and input opportunities
- Custom reports will be provided as requested by sponsors; these typically will be produced on a quarterly basis for an additional fee

## THE ZITTER GROUP

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The Zitter Group is a specialized healthcare consultancy uniquely positioned to provide strategic solutions for pharmaceutical and biotech companies specific to the influence of access and reimbursement on life science products.

Since 1989, The Zitter Group has worked with life sciences product manufacturers and managed care organizations to develop effective access and reimbursement strategies by combining a wealth of expertise in economics, medicine, the life sciences, and marketing.

TZG has conducted extensive primary market research evaluating market dynamics in a wide range of categories throughout various stages in the product life cycle. The Zitter Group has also developed marketing, development, and distribution strategies for a wide range of biotechnology and pharmaceutical products, including several of the world's best selling therapies. Considerable research has been on third party management of oncology therapies, specifically on the distribution and management of oral oncologics, payer management and adoption of oncologic label expansion, and the evolution of payer oncology management priorities, tools, and strategies.

The Zitter Group produces three large syndicated analyses of the commercial payer market. The *Managed Care Injectables Index*, produced twice annually, is a large quantitative study of 100 payer decision-makers that tracks the management of over 50 biologic and specialty therapies and the role of specialty pharmacy vendors therein. The *Managed Care Oncology Index*, a twice annual dual-arm study of 100 payers and 100 oncology practices, provides a detailed analysis oncology management across all major tumor types and sites of care. Finally, the *Managed Care Benefit Design Index*, which features parallel arms of 100 payer and 100 employers, focuses on the key trends in and drivers of benefit design decisions, with an emphasis on long-term implications. Collectively, these ongoing studies serve as a key source of The Zitter Group's proprietary insight and expertise in managed markets.

Additionally, The Zitter Group manages the nation's largest database of prior authorization policies. The *Prior Authorization Tracking Tool* is a subscription data service that monitors and analyzes details of prior authorization policies for numerous therapeutic categories across a range of payer types. The Zitter Group also produces advisory boards, multi-disciplinary steering committees, and webcasts. A unique advisory offering is *P&T Perspective*, a double-blinded Pharmacy & Therapeutics Committee simulation that can be observed live in real time or subsequently on DVD.

FOR MORE INFORMATION, contact TZG at 973.376.1300 x101 or [MCMM@ZITTER.COM](mailto:MCMM@ZITTER.COM)