

IBM Software

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Competitive intelligence.
'A strategic business driver'

Mark Cooper

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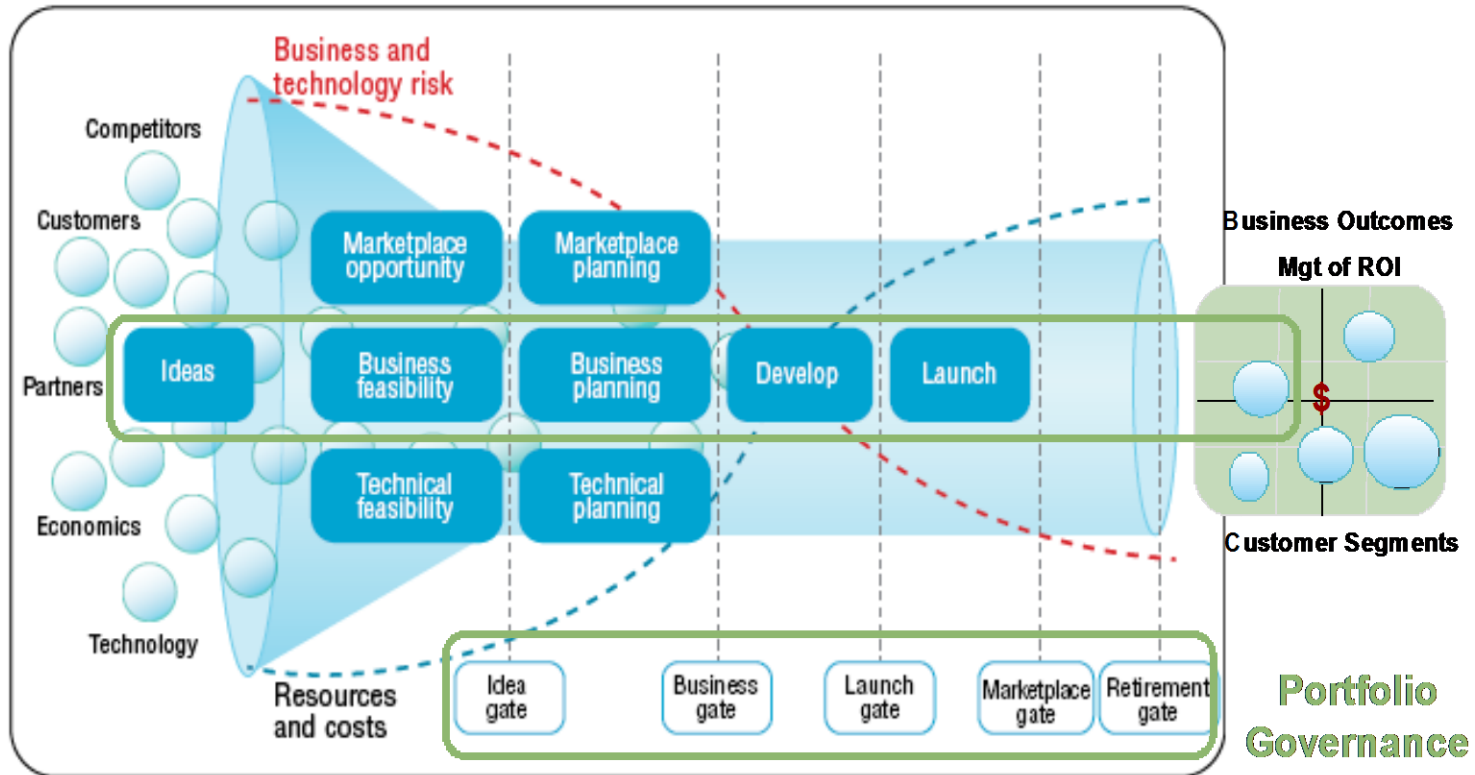
Agenda

- Background
- Capturing data – Organizing
- Analyzing data – decision support
- Outcomes & benefits



The Product Mgt Function plays a critical role in our organisations!

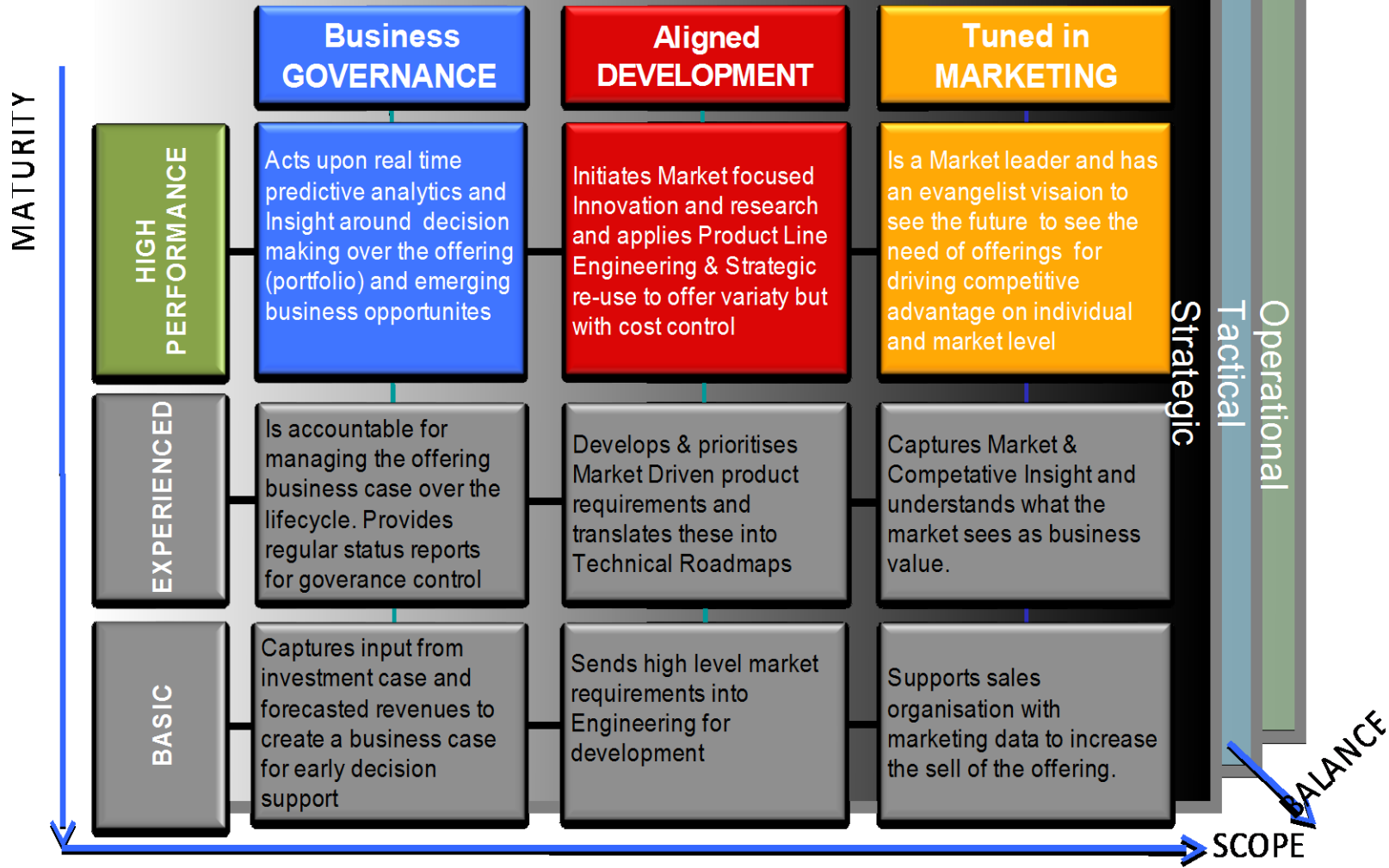
Market Driven



“ Product mgrs are more frequently acting like CEOs bearing the **responsibility** for the strategic and tactical activities that help align a set of capabilities in the market place with what the customers value”



We see product management is driven by real time data and information



Company/trading background & environment

- Globalisation
- Healthcare reforms
- Supplier relationships
- Regulatory pressure
- Trend towards substitutes /commoditisation/elimination
- **Purchase price + cost of usage**



- Packaging for temperature sensitive drugs (e.g. vaccines)
- Trading since 1975 (competitors 10-15 yrs)
- Operations expanding beyond Europe
- 50+ regional competitors (packaging suppliers)



‘Original mission’

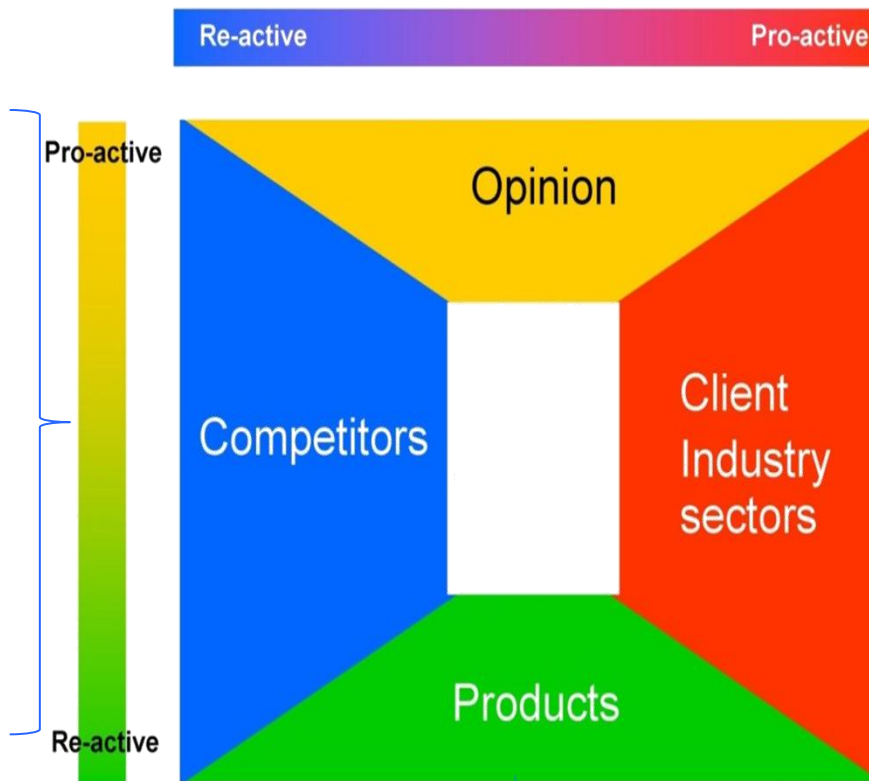
- Provide a ‘view’ of market trends/movements
- Monitor competitor activity
- Catalogue products (analysis)
- Track trends (identify, prioritise markets/products)

“80% of what a company needs to know about markets/competitors already exists inside the organisation”



Market insight to competitive advantage

Product dev. (features)
 Competitor Intelligence
 Product comparison
 Benchmarks
 Opinions



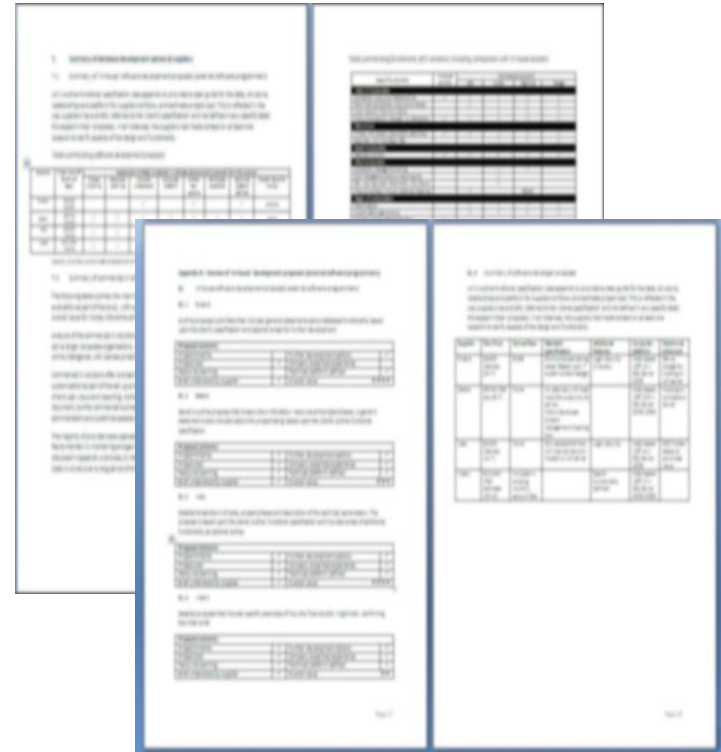
Product dev. (benefits)
 End-user insight
Market opportunities
Market intelligence
 Define approach to market
 New prospects
 Trade events
Opinions

Product dev (pricing)
 Manuf cap (investment)



Delivering a solution

- ‘Key Intelligence Topics’
- Functional brief
- Review DIY & commercial providers
- Business case/justification
- Developed the workspace
- Internal pre-launch communication



- User group 25 people, cross functional/international
- Launched in March 2012 (16 competitors & 900+ products)



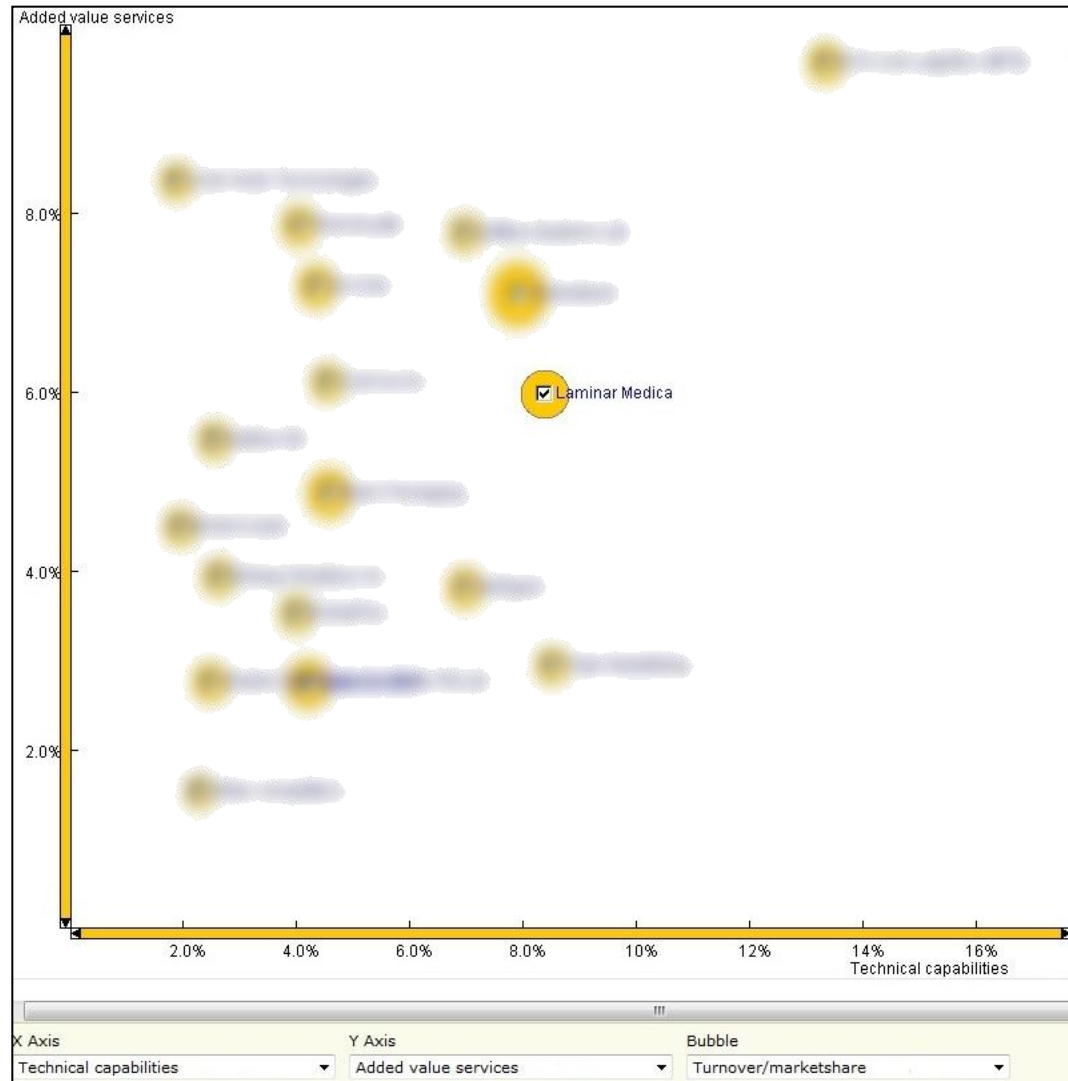
Capture market insights

News Date	Summary	Industry Sector	Link to Article
21/06/12	The pharma industry and its supply chain partners will increase revenues from 2012 to 2022. New products - novel small molecules, generics and biologics - will stimulate the pharma W&D market. Many opportunities for rising drug sales exist, with high, growing W&D revenues possible from 2012 to 2022. There will be increasing dependence on emerging countries, with their fast-rising drug sales. Developed countries hold promise too, the study notes	Transport/logistics	http://www.healthcareglobal.com/press_releases/pharma-wholesale-and-distribution-market-will-reach-747bn-in-2014-visiongain-report-predicts

Cryopak Announces The Release Of Their New Pallet Transporter CRT	18/07/12	Cryopak
Thermopod: Cold chain packaging consists of biodegradable components	12/07/12	Other competitors
Pelican Launches New Pelican BioPharma(TM) Division	20/06/12	Other competitors



Analyse KPI's/competitive position




Compare different offerings against important criteria

Which reduces cost of ownership most? 🏠


Product Name	Description	Product Classification	Reusable product	External dimensions	Product dimensions	Unit price (£)
Cube Series -1296		Frozen	No	445x406x406 (mm)	229x229x229 (mm)	
therm 10	Fully compliant to IATA, ADR, and 49 CFR (DOT)...	Frozen	No	357x309x315 (mm)	258x208x198 (mm)	

Image



Document link
Product literature
Ambient temp profile

Image

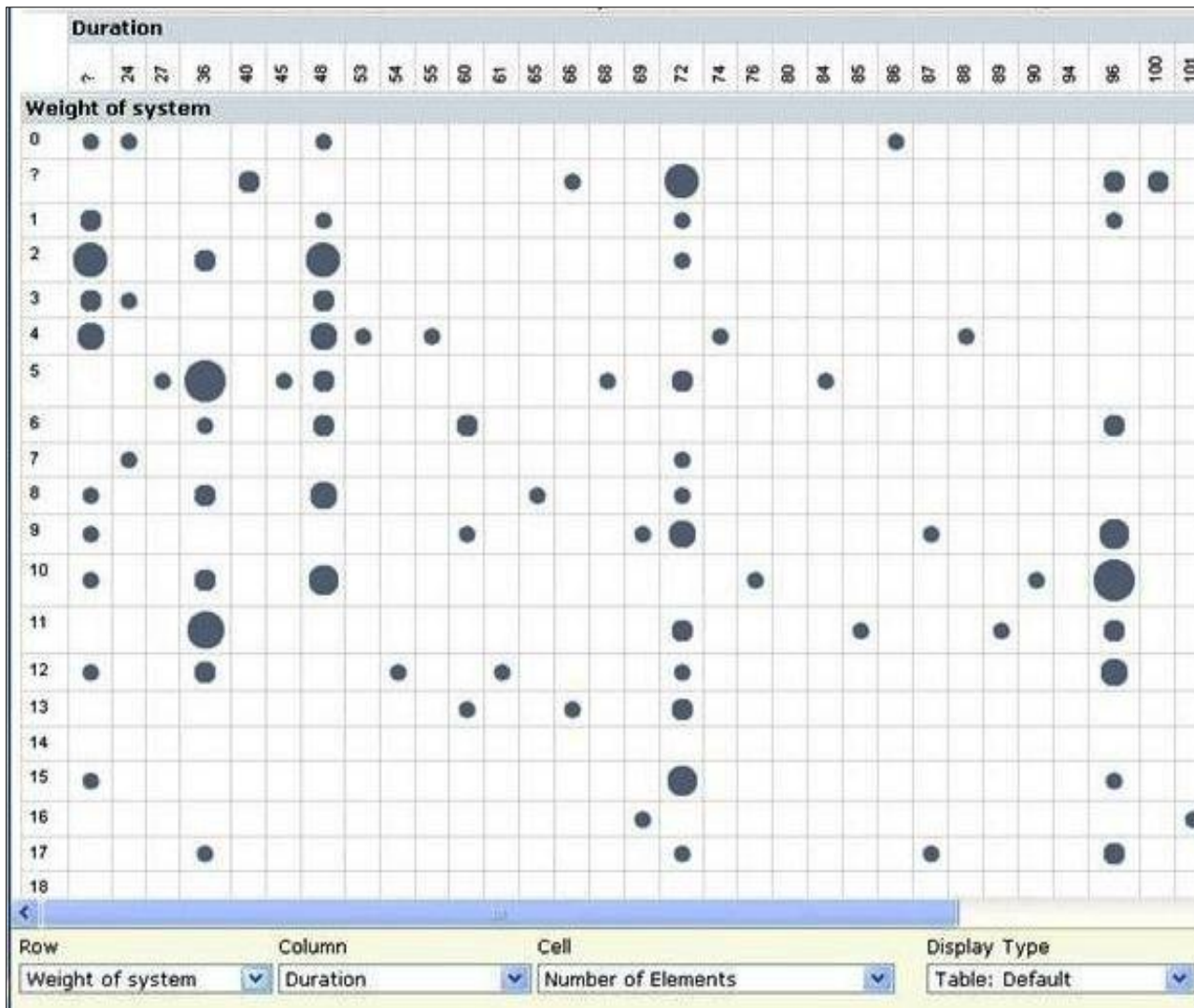


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View competitive product landscape



Map features to strategic objectives

Product features(1/13)


- Air cargo compatibility**
- Single seasonal packout confi
- Maximised payload design
- Robust thermal performance
- Intuitive & logical assembly
- Flatpack for transportation
- Global manufacture
- Reduction in component parts
- No coolpack pre-conditioning
- Use of common components
- Waste minimisation
- Limited reusability
- Refurbished component parts

Air cargo compatibility

Title: Air cargo compatibility

Description: Ensure that shipper footprint aligns with the dimensions of the LD7 cargo pallet. Optimising useful conditioned space, allowing more medical product to be shipped, reducing cost per dose etc.

Image:



Comments

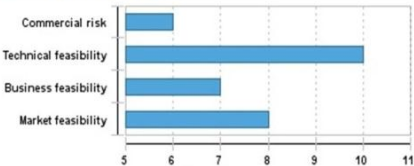
Tyler, 2012-5-26: I believe that there will be huge demand for a reliable yet cheaper alternative to present range of active systems, providing that the packing operation can be made less labour intensive, to make the economics workout, to be compelling.

Amanda, 2012-06-21: An effective alternative to active shippers is needed, but attention must be focused on making the packout design very easy, my customers state this as a major drawback with our current products, which is why they use active for larger bulk shipments.

Business mechanism: Focus on selling to people shipping products using air freight services. Offers an alternative to active systems which currently dominate this sector.

Implementation: Use new high volume moulding, that allows easy front loading access, that does not compromise available medical product space. Sold alongside other complimentary components to ensure temperatue stability inbetween phases of transit.

Feasibility



Category	Score
Commercial risk	6
Technical feasibility	10
Business feasibility	7
Market feasibility	8

Products: ★ Laminar Medica: CoolPall Half PMC

User requests: Confidential at this stage of development

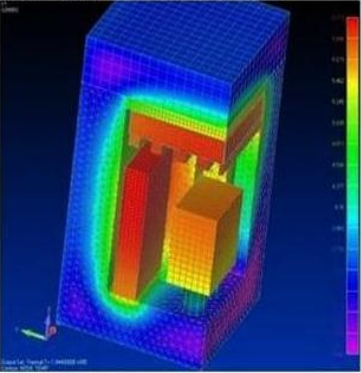

Strategic objectives

- ◆ Increase customer retention
- ◆ Introduce new products to new/existing markets
- ◆ Expand sales in strategic global markets
- ◆ Cross-sell existing products/services
- ◆ Improve our service offering to customers



Prioritise product development ideas

Which feature poses less commercial risk? ☰

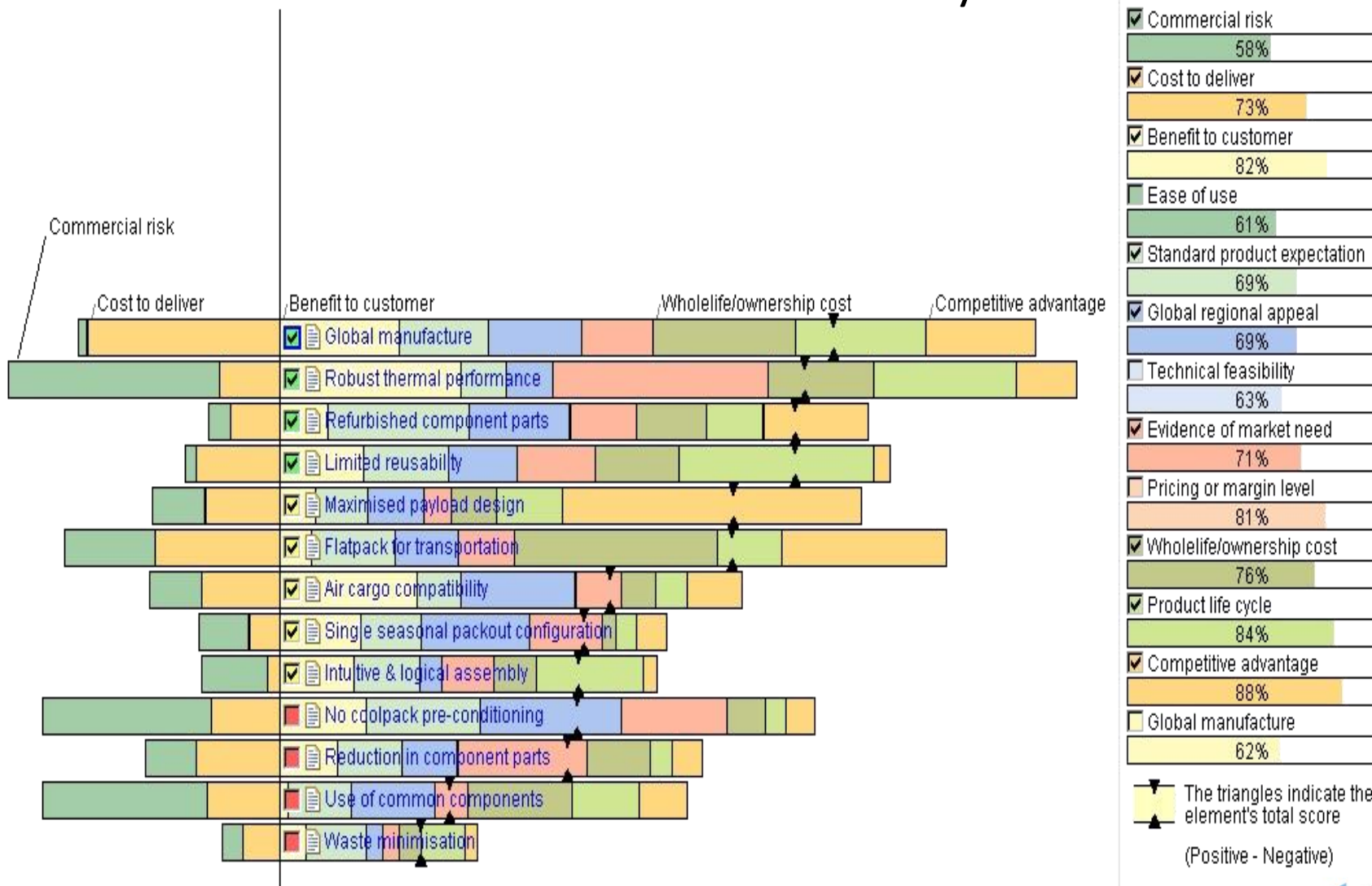
Robust thermal performance 🔍 📄 ✎ ⚖️		Air cargo compatibility 🔍 📄 ✎	
Title	Robust thermal performance	Title	Air cargo compatibility
Description	Maintain the integrity of product design to ensure that the product can perform in line with the companies reputation, according to the external temperatures and durations that may be encountered by customers. This relates specifically to new markets and regions where external ambient temperatures and transport routes may cause technical challenges.	Description	Ensure that shipper footprint aligns with the dimensions of the LD7 cargo pallet. Optimising useful conditioned space, allowing more medical product to be shipped, reducing cost per dose etc
Image		Image	
Comments	<p>Mary, 2012-3-21: Customers in South America and Africa pose a particular challenge with a combination of high temperatures and protracted customers/logistics arrangements.</p> <p>Glen, 2012-03-27: In my experience pharmaceutical producers in South America mainly ship 2-8C temperature bands, humidity cabn also play a role in some markets, like some parts of Asia.</p>	Comments	<p>Tyler, 2012-5-26: I believe that there will be huge demand for reliable yet cheaper alternative to present range of active systems, providing that the packing operation can be made less labour intensive, to make the economics work out, to compellir</p> <p>Amanda, 2012-06-21: An effective alternative to active shipping is needed, but attention must be focused on making the packing design very easy, my customers state this as a major drawback with our current products, which is why they use active for large bulk shipments</p>
Business mechanism	Target growing regional markets that have a more fundamental requirement for temperature control, without the same level of medical regulation where many domestic operators offer unqualified packaging solutions.	Business mechanism	Focus on selling to people shipping products using air freight services. Offers an alternative to active systems which currently dominate this sector.
Implementation	Thermally re-qualify products for new regional markets to redefined higher ambient temperature profiles, adjusting the internal components to deliver the required benchmarks for transit	Implementation	Use new high volume moulding, that allows easy front loading

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Perform multi-dimensional analysis



Perform market segmentation

Industry Sector Table(1/11)

- Clinical trials
- Laboratory
- Blood/tissue/cells
- Biotechnology
- Animal health
- Hospitals
- Transport/logistics
- Packaging
- Distributor
- Pharmaceutical
- Other

Clinical trials

Title	Clinical trials
Description	(Logistics/support services) Sample identification, and storage according to the protocols of a clinical study. Service organisation that provides support to main drug research services. These range from large full service organisations that progress a new drug concept from early stage to regulatory approval to smaller organisations that employ staff for these services. (Academic institute) An establishment, undertaking CT design, conduct and analysis. (Government representative) Regulatory authorities, government drug agencies.
Organisations	<input type="checkbox"/> (MHRA) UK Medicines and Healthcare products Regulatory Agency <input type="checkbox"/> (FDA) Food and Drug Administration <input type="checkbox"/> (EMA) European Medicines Agency

(ABPI) The Association of the British Pharmaceutical Industry

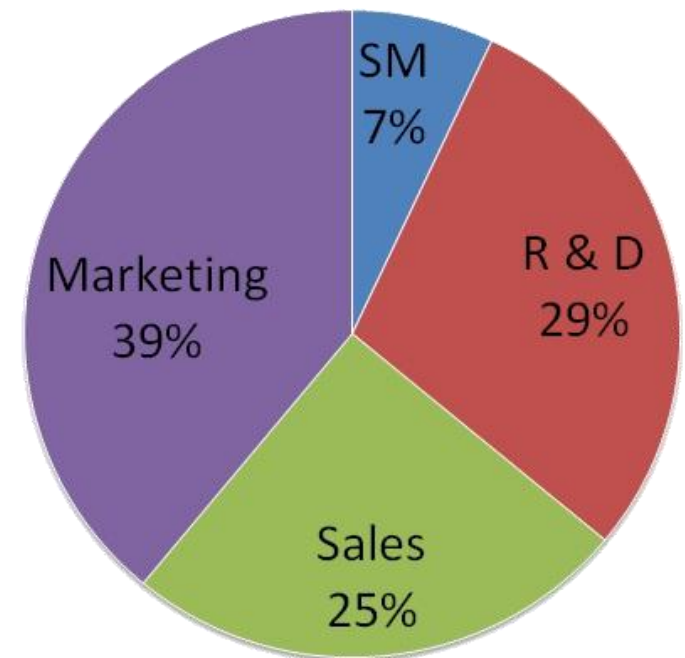
Title	(ABPI) The Association of the British Pharmaceutical Industry
Description	The Association of the British Pharmaceutical Industry (ABPI) has 150 members including the large majority of the research-based pharmaceutical companies operating in the UK, both large and small. Our member companies research, develop, manufacture and supply more than 80 per cent of the medicines prescribed through the National Health Service (NHS).
Area of interest	News, trade links, market intelligence
Comments	Administrator 15/09/11 15:55: Good source of information about the pharma market
Industry sectors	<input type="checkbox"/> Pharmaceutical <input type="checkbox"/> Biotechnology
Website	http://www.abpi.org.uk

CT Academic institute	7
CT SMO	9
CT Government rep	3



User activity

- Workspace deployed with 25 users
- Product/market comments
- ID gaps in product/service offerings (SWOT)
- Benchmark product specifications
- Competitor regional/product coverage



Main outcomes & benefits

- Better idea of where the 'real' competition is
- Competitive insight into how to 'close the gaps'
- Promoted a willingness to share/require information
- Used to reaffirm product development priorities
- Creation of a 'decision support resource'
- Highlighted multiple LT strategic avenues



Summary

- Market Driven and a High Performer
- Competitive Intelligence
- Be smarter, better and more effective
- Be smart – use Rational Focal Point
- Receive benefits and value quick – in an area like this you have no time to lose



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