



CAPSYS

STRATEGY | EXECUTION

Strategic Planning Overview



Our Mission

*To enable leading Life Science companies
to deliver powerfully on their strategies and to win*



A Strategic Planning Review can be used to establish a baseline for improving capabilities

Objectives

- Set a baseline and inform a capability roadmap
- Identify minimum/gold standards and best practices
- Identify and capture insights for improving the current brand planning process
- Foster cross-brand sharing and continuous improvement in brand planning
- Inform on training needs

Findings are leveraged to enhance:

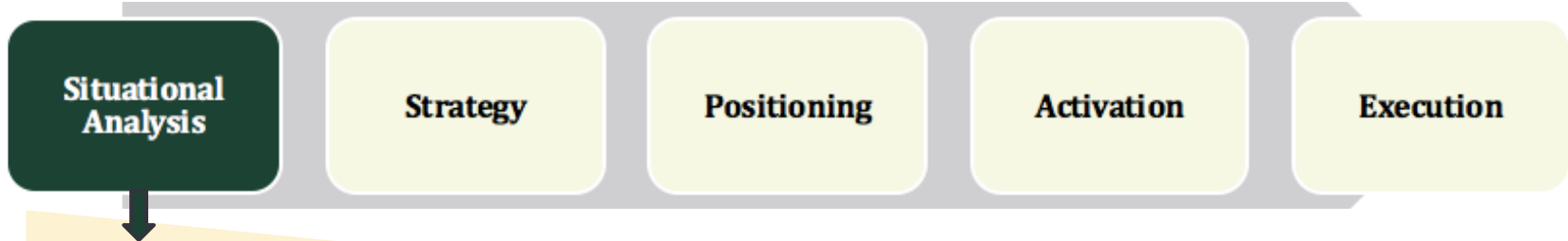
- Strategic Planning process
- Training curriculum and materials
- Role definitions and career path
- Guidelines and “how-to” materials
- Additional Commercial Organization topics

Foundational Skills	Strategy	Positioning	Activation
Brand identity Brand architecture Brand messaging Brand voice Brand personality Brand promise Brand positioning Brand strategy Brand touchpoints Brand values	Brand architecture Brand messaging Brand voice Brand personality Brand promise Brand positioning Brand strategy Brand touchpoints Brand values	Brand identity Brand architecture Brand messaging Brand voice Brand personality Brand promise Brand positioning Brand strategy Brand touchpoints Brand values	Brand identity Brand architecture Brand messaging Brand voice Brand personality Brand promise Brand positioning Brand strategy Brand touchpoints Brand values





What the Review could look like...



Content	Score					Comments	Minimum Standards Met? Y/N	Gold Standards Candidate? Y/N
	Rating							
	Poor		Average		Excellent			
▪ Executive Summary	1	2	3	4	5	• ...	• ...	▪ ...
▪ Market Situation Analysis	1	2	3	4	5	• ...	• ...	▪ ...
▪ Pricing Situation Analysis	1	2	3	4	5	• ...	• ...	▪ ...
▪ Access Situation Analysis	1	2	3	4	5	• ...	• ...	▪ ...
▪ Medical Situation Analysis	1	2	3	4	5	• ...	• ...	▪ ...
▪ Competitor Landscape	1	2	3	4	5	• ...	• ...	▪ ...
▪ SWOT	1	2	3	4	5	• ...	• ...	▪ ...
▪ Patient Flow	1	2	3	4	5	• ...	• ...	▪ ...
▪ Opportunities & Threats Map	1	2	3	4	5	• ...	• ...	▪ ...



Overview of a typical Strategic Planning Review

Scope

- Can be setup for a specific business unit or therapeutic area or for a representative sample of plans across the organization (~10-25 plans)

Key Activities

- Collecting and reviewing brand plan materials for all products in scope
- Attending brand presentations to senior management, if necessary
- Assessing individual brand plans according to defined criteria
- Preparing individual brand assessments for feedback to brand teams
- Preparing a comprehensive report-out for senior management
- Identifying learnings and possible best practice examples
- Conducting meetings with key stakeholders and capturing feedback on brand planning process

Timing

- 10-15 days effort over 3 weeks (depending on scope)



Contact



DAVID SANCHEZ – Managing Director

David is a co-founder of CapSys and a highly regarded senior advisor who specializes in strategy execution topics in the Life Sciences industry. The focus of his efforts over the past 15+ years have been with Pharmaceutical, Biotech and Medical Devices clients in the North American, European and MEA regions.

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