TRIANGLE INSIGHTS GROUP by mercalis

Case Study – Unlocking Value through Access Benchmarking

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CASE STUDY

Introduction

One of the biggest contributors to missed forecasts in recent pharmaceutical launches is challenges with post-launch market access. Manufacturers launching new therapies grapple with a variety of strategic choices under the market access umbrella including optimization of initial coverage, rebate strategy, affordability programs to mitigate patient out-of-pocket costs, and reduction of utilization management burden on providers and patients.

Leveraging Triangle Insights Group's Market Access Accelerator, manufacturers can proactively evaluate access strategies and craft data driven solutions ahead of launch. This approach accounts for the increasing complexity of market access dynamics and accelerates value by informing gross-to-net preservation while optimizing quality of access.

Specifically, the Market Access Accelerator enables manufacturers to leverage deep access insights to understand drivers of payer coverage and policy decision-making -- generating optimized quality of access insights to inform launch planning and avoiding year one missed expectations.

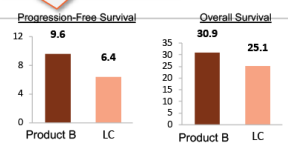
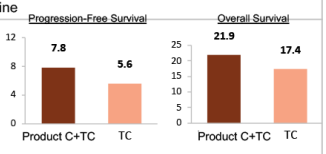
As a recent case study, our team leveraged the Market Access Accelerator to inform the launch of a novel oncology therapeutic. The client team was seeking to inform launch strategy, KPIs, and evaluate resourcing for rebates relative to other access spend (e.g., patient affordability). The team selected relevant analogs to evaluate payer decision making and quality of access.

Components of the analog evaluation included key strategies and market positioning that may impact payer decision making. Specifically:

- Analog evidence package in the context of the market landscape and current standard of care
- Analog pricing strategy (list, net) relative to competitors
- Relevant coding
- Distribution and care setting dynamics
- Patient services offerings (e.g., affordability support)
- Policy considerations

Product A was approved in 2019 for patients on two prior antiHER2 therapies through accelerated approval but moved into the second line with favorable head-to-head data versus Product B in 2022.

Currently Approved Branded Products

	Product A		Product B	Product C
Company	**Company 1**	**Company 2**	**Company 3**	**Company 4**
Approved Indication	For the treatment of patients with unresectable or metastatic HER2-positive breast cancer who have: **Received two or more prior anti-HER2-based regimens in the metastatic setting (2019)**	**Received a prior anti-HER2-based regimen either in the metastatic setting or in the neoadjuvant setting and have developed disease recurrence (2022)**	For the treatment of patients with HER2-positive, metastatic breast cancer who **previously received trastuzumab and a taxane**, separately or in combination	**In combination with trastuzumab and capecitabine** for treatment of adult patients with advanced unresectable or metastatic HER2-positive breast cancer, including patients with brain metastases, who have **received one or more prior anti-HER2-based regimens in the metastatic setting**
Approval Date	**12/19/2019 (Accelerated Approval)**	**5/4/2022**	**5/3/2019**	**4/17/2020**
MOA	HER2-directed antibody and topoisomerase inhibitor conjugate		*mDOR was 12.6 months – less than that of Product A at accelerated approval* HER2-directed antibody	
ROA	IV			Oral
Treatment Line	2nd Line		3rd Line	
Key Clinical Results **DESTINY-Breast01, DESTINY-Breast03**	**Objective Response Rate: 60.3%** **Duration of Response: 14.8 months** (single-arm trial)	**Progression Free Survival: (18.5, NE)** vs. (5.6, 8.2) for Kadcyla **Objective Response Rate: 82.7%** vs. 36.1% for Kadcyla		

(L) Lapatinib, (C) Capecitabine, (T) Trastuzumab, Source: FDA Labels, accessed November 2024

Example output of standard of care evidence packages for comparison purposes

The team then evaluated payer behaviors (by plan and account) and other commercial outcomes to understand how strategies and tactics influenced coverage, quality of access, and overall commercial performance. These included:

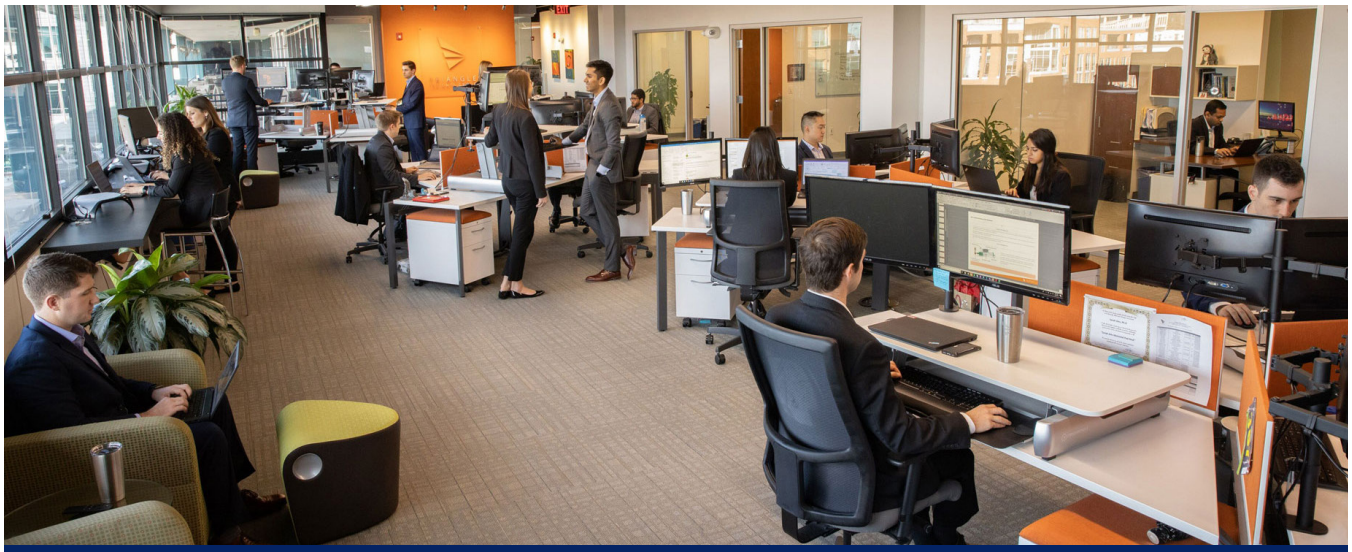
- Coverage criteria
- Payer policy development and adoption (time, criteria)
- Utilization management
- Revenue
- Sales relative to pre-launch forecast

Example output from Market Access Accelerator: Time to policy development, by plan and volume of covered lives as well as quality of access perspectives leveraging payer policies (quantified to understand impact on overall market opportunity)

Ultimately, the team evaluated the impact of strategic market access choices on time to access and quality of access to inform the appropriate investment by account type (rebates) as well as potential considerations for meaningful launch KPIs.

The client was able to inform launch planning at the account level, avoid overspend without ROI, and optimize launch strategy and commercial expectations in year one.

If your organization is developing an asset and looking to optimize your market access strategy and avoid the common launch pitfalls, reach out to Triangle Insights Group to explore the utility of the Market Access Accelerator and how we can strengthen your market access commercialization strategy.



Triangle Insights Group

New Product Planning
We develop asset strategies and execute on activities to define the commercial opportunity, support and optimize the target product profile, understand the patient journey, and identify drivers and barriers that may shape the commercial success of clinical-stage programs.

Corporate Strategy and Due Diligence
We partner with pharmaceutical companies and private equity investors to conduct commercial diligence related to potential investments within the life sciences market.

Pricing & Market Access
Our broad therapeutic expertise and institutional knowledge of key access decision makers and influencers help us develop unparalleled insights to inform our clients' commercial strategy.

Brand Strategy and Commercialization
Our Launch Excellence experts engage with pharmaceutical and biotech companies to plan, lead, and execute on successful launch strategies. Triangle Insights Group has participated in 75+ launches.