

# Defining an organizational and capabilities roadmap for future market leadership for an oncology medical affairs team in a global biopharma client



## Client Challenge

The client, a global biopharma company, is continuing to build its presence in the North American oncology market and sought KPMG's help in defining what a market-leading future state oncology medical affairs team should look like that can best meet the needs of both internal and external stakeholders in a rapidly changing and dynamic market

## Project Phases

**Defined the context and strategic rationale for change** by collecting and reviewing key data from the client and conducting internal interviews to understand strategic context and opportunity for improvement, as well as internal stakeholder needs

**Conducted external stakeholder interviews** (e.g. KOLs, competitors and payers) and desktop research in order to map the targeted health solutions landscape in the market

**Developed and prioritized the capability requirements** to define the medical affairs organizational framework, including assessing the gaps between current state and the optimal future state

**Identified key initiatives required to fill gaps** to future-state, drafted implementation requirements, and outlined a detailed Executive Summary for senior management

## Outcome For The Client



Elevation to the global medical affairs team of the importance of the local oncology market to the client's strategic growth in oncology



A comprehensive gap analysis highlighting areas for investment that would bring the client's medical affairs function up to competitive parity



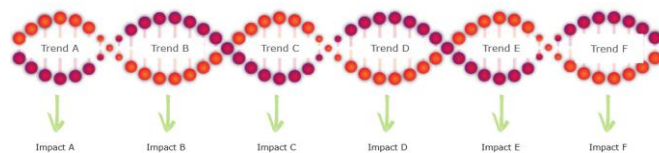
A mid-term and long-term roadmap for future market leadership, centered around partnerships, technology/digital and precision medicine

## Evolving Oncology Market

Executive Summary: Oncology Macro Trends

Macro trends are impacting the oncology market that have profound implications for the future role of the Medical function

Major Oncology Trends Impacting Medical Affairs (not exhaustive)

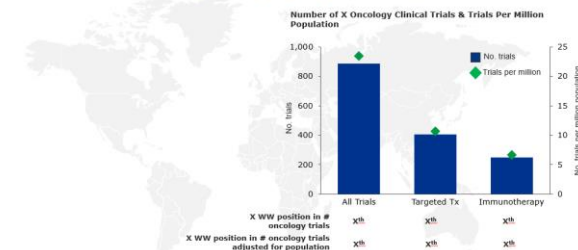


A market leading Medical Affairs team of the future must be in a position to meet these challenges in order to exceed expectations of both internal and external stakeholders

## Local Market Dynamics

Executive Summary: Competitive Environment

X is the 3<sup>rd</sup> most active country for oncology clinical trials on a population basis, & has some of the world's leading KOLs, highlighting its critical importance to biopharma



## Strategic Roadmap

Executive Summary: MAF Future State (1/4)

To become a market leading Medical team of the future, X must institute a three-step strategic roadmap around 'fix', 'build' and 'achieve'

