

Global to Local Launch Dynamics: Setting up for Success

Introduction

As companies with global commercialization aspirations move from clinical development to launch, it becomes important to address a new horizon of challenges – how can one navigate the complexities of launching in key global markets and ensure success in local adaptation, all within budget and time constraints?

The ability to harmonize launch strategies across multiple markets while accounting for each country's regulatory, clinical, cultural, and logistical nuances is critical for any company in order to ensure a successful launch. Without a well-crafted strategy and cohesive teams working collaboratively at the global and local level, companies risk delays, increased costs, and missing launch forecasts.

In this whitepaper, ClearView will discuss best practices and key considerations we have observed working with leading pharma clients. Our insights aim to provide a roadmap for overcoming key challenges and drive successful market entry at a global (and local) level.

Key Takeaways



Strategize Early – Initiating early planning of your commercialization objectives, priority markets, and launch timelines informs all downstream collaboration and coordination



Define your Teams – Clear delineation of responsibilities between cross-functional global and regional affiliates supports smooth operations across teams and geographies



Collaborate for Success – Flow of insights and collaboration across global and local teams are paramount to support sustained success

Start Strategizing Your Launch Plans Early

As with every good strategy, starting early and having a comprehensive understanding of the business context, objectives, and internal capabilities sets the foundation for a successful launch. Launch planning by global teams should begin at least three years in advance (L – 3) for novel therapeutic areas. Ahead of L – 3, global teams must align on commercialization objectives and priorities (e.g., commercial potential, access situation, and launch investment requirements) to help inform the broad commercialization approach. Early understanding of priority markets is also key to inform launch sequencing, critical market research, and cross-functional launch planning efforts. This understanding is particularly important in deciding when to involve local teams in the planning process, establishing strong relationships, and incorporating viewpoints / evidence generation needs into pivotal trials.

It is important to frame up a master timeline for your launch and assess key decision points across the pre-launch period across priority launch geographies. Clearly laying out internal and external milestones will assist your organization in understanding the decision(s) that may be needed (e.g., finalization of GTM approach after competitor launch) and strategize ahead of potential milestone scenarios. Early planning sets the stage for optimal execution and requires significant strategic insights on your key product, customer, and market dynamics to set your organization up for continued success.

Case Study:

Strategic planning is at the core of a successful launch and requires extensive market evaluation. Recently, we completed an assessment to refine a client's ex-U.S. launch strategy. While the original go-to-market plan included all European countries, re-evaluation of profitability and implementation feasibility helped re-shape focus on select European countries only to meet overarching company goals, considering manufacturing and distribution costs for their biologic.

Develop Global Launch Teams and Define Roles

The global launch team function was originally created to help coordinate across geographies and plays a key role to support a harmonized launch. Alignment on roles, responsibilities, and ownership over decision-making is imperative for each team member and market. In particular, responsibilities must be delineated between global vs. local teams – ensuring that teams are aligned on the overarching strategy while continuing to facilitate local customization and adaptation.

Global teams also frequently act as an extra resource for smaller markets to streamline and harmonize resources. Compared to U.S. teams (which are typically the best resourced with independent roles), smaller markets frequently have lean headcounts and smaller budgets and therefore rely more on global support, either for insights or resources which they can adapt / translate to their local market situation as needed. This frequently occurs with market research such as HCP segmentation research where global teams develop global archetypes that are applicable for local teams to translate as needed.

Case Study:

Clearly establishing roles and responsibilities of global and local affiliates is critical to joint success in cross-functional collaboration. Recently, we have extensively supported a large pharma for 3 years preceding launch to conduct detailed operational characterization for a novel gene therapy, which was made possible through extensive cross-functional team working sessions to define global launch strategy and regional implementation (e.g., local testing dynamics, clean hood practices in pharmacies).

Importantly, global teams must operate both across geographies and across functions. A core focus of early launch planning is cross-functional engagement across commercial, medical affairs, market access, supply chain, patient advocacy, corporate communications, regulatory, and legal teams. Similarly, establishing trustful and collaborative relationships between global and local colleagues to support operations across markets is paramount to any successful launch.

Collaborate to Ensure Success and Collect Learnings

Collaboration and coordination are the fabric of successful launches which require global to local exchange. Global's collaboration with local launch teams is critical to drive success in launch and information must flow both ways: from global to local, as well as local to global.

Particularly for priority markets (e.g., U.S., DE, CN, JP), it is important to involve local teams in the development of the global launch strategy. Commercial and medical affairs functions from these markets should be involved in developing and/or pressure-testing the global strategy to help local teams internalize the strategy and have a sense of ownership. Once the strategy is developed, creating guidance for local markets on important parameters for the strategy is needed to ensure local teams understand the rationale for what must be harmonized with global and what can be tailored their own markets.

Case Study:

Developing cohesive guidance for global vs. local teams is critical to ensure smooth hand-off across teams. We recently supported a client in synthesizing a global launch roadmap and a global-to-regional strategy playbook which supported an optimized handover and flexible implementation of the global strategy.

The ability of global teams to collect local insights and learnings is also critical to drive sustained success. Local teams need to share best practices and key learnings from their markets with global / other countries through appropriate forums. For example, a nuanced understanding of product differentiators in Germany or France could be applicable across other later-to-launch European countries with similar landscape characteristics or treatment practices. Markets launching earlier should share what resonated well and potential learnings for improvement, whether that may be tweaks to a campaign or tactical execution of field teams. With each launch, global should be internalizing insights, monitoring performance, and sharing insights with countries not yet launched to support success of subsequent launches.

Closing Thoughts

As organizations consider building out or transforming their global launch capabilities, implementing these best practices and ways of working between global and local teams is important to ensure global launch success. These guiding principles are key to establishing a strong foundation, ensuring teams can work in lockstep throughout launch planning to achieve commercialization goals.

At ClearView, we have significant expertise in providing support to small and large biopharma in guidance towards successful, global launches. For each of our clients, we leverage our extensive scientific expertise and commercialization experience to provide strategic support throughout launch planning workshops, launch readiness reviews, competitive simulations, and more, to support efficient and effective global to local transition. We have extensive experience supporting cross-functional teams to coordinate launch readiness, including workshop planning with regional VPs and country GMs, in addition to P&MA experts, CMC, and logistics.

We understand the importance of aligning global and local strategies for successful product launches. Our approach ensures that global teams can create flexible, adaptable launch frameworks that account for local market adaptations, without diluting the core global strategy. We also work closely with local teams to ensure that they can effectively tailor global strategies to address unique market challenges—whether it's understanding the local patient journey, navigating HCP barriers, or supporting identification of the ideal patient type. Our expertise in healthcare strategy and market dynamics allows us to provide the insights and support needed for a cohesive and successful launch.

About ClearView Healthcare Partners

Founded in 2007, ClearView Healthcare Partners is a global strategy consulting firm serving the life sciences sector, with offices in Boston, New York, San Francisco, London, and Zurich ready to support clients in complex engagements with local expertise.

ClearView combines international industry knowledge and deep scientific expertise in every major therapeutic area and across modalities with an extensive network of external stakeholders to deliver practical and actionable recommendations. ClearView's projects include cross-functional support at the corporate, franchise, and product levels for pharmaceutical, biotech, medtech and digital, and diagnostics companies, along with investment support across all phases of the transaction cycle for private equity and institutional investors.

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