



# **Sugammadex Communications Program**

*Achieving Optimal  
Neuromuscular Blockade*

August 3, 2007

## Optimizing Neuromuscular Blockade (Esmeron and Sugammadex)

- Market Research and Insights
  - Decision making process
  - Stakeholders
  - Gaps in care
  - Access
- Strategic Approach
- Communication based tactical roll-out
- Measurement and Evaluation
- Why H&K?



# Research & Insights

# What Did We Consider?

## *The Current Environment*

Decision making process in Anaesthesiology

Key stakeholder groups

Gaps in current care

The regulatory landscape

Economic pressures

## *The Media*

Media Audit

Media Interviews

Media Analysis

## *The Competitive Landscape*

Market Reports

Analyst Reports

Physician Interviews

# Key Considerations from the Research: Market Profile



Pavulon

**AnesthesiaNow™**  
Your trusted source for anesthesia information



**More than 40 years of anaesthesia research and development together with anaesthesiology professionals**



Norcuron



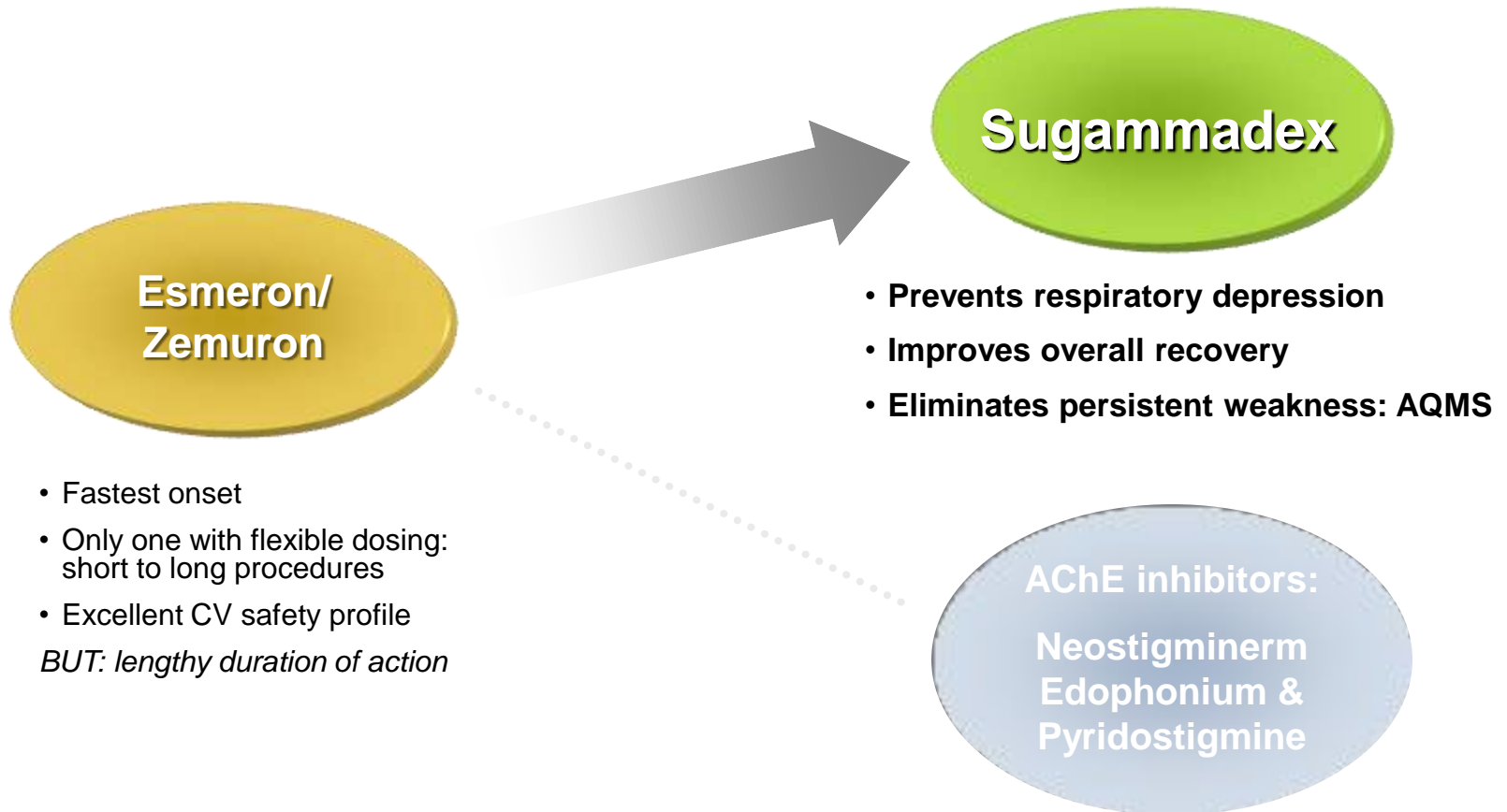
TOF-WATCH

*Organon is recognized and accepted as a key player in the anaesthesia market*

# Key Insights: Post-Sugammadex

Neuromuscular Blocking Agent

New Reversal Agent



*Sugammadex unleashes Esmeron's potential as a joint therapy  
not a security blanket*

# Key Considerations from the Research: Market considerations

## US

## Ex-US

### **Key Differences:**

*The importance of reaching certain target audiences differs in the US and ex-US markets*

*Media landscapes and media interest in this field differ in the US and ex-US markets*

- Surgeons: are becoming more active in administering anesthesia
  - Nurses: can play major role in anesthesia from administration to patient support and counseling: many times overlapping role of anesthesiologist
  - Patients: can be confronted with anesthesia choices and burdened with covering more of the costs anesthesia procedures.
  - Direct to Patient (DTP) education can be an important tool in reaching targeted patients
  - Media coverage is minimal and usually sensationalist
- Surgeons: have limited incentive to get involved in anesthesia
  - Nurses: have contact with patients but virtually no decision making power or authority to administer anesthesia
  - Patients: have little choice in brand of anesthesia and also have minimal contact with doctors and nurses during the anesthesia process
  - No consumer media, purely data driven in specialist media

# A Fatal Marketing Error

*Unmet need*

+

*Great new technology*

=

*Successful Market Uptake*

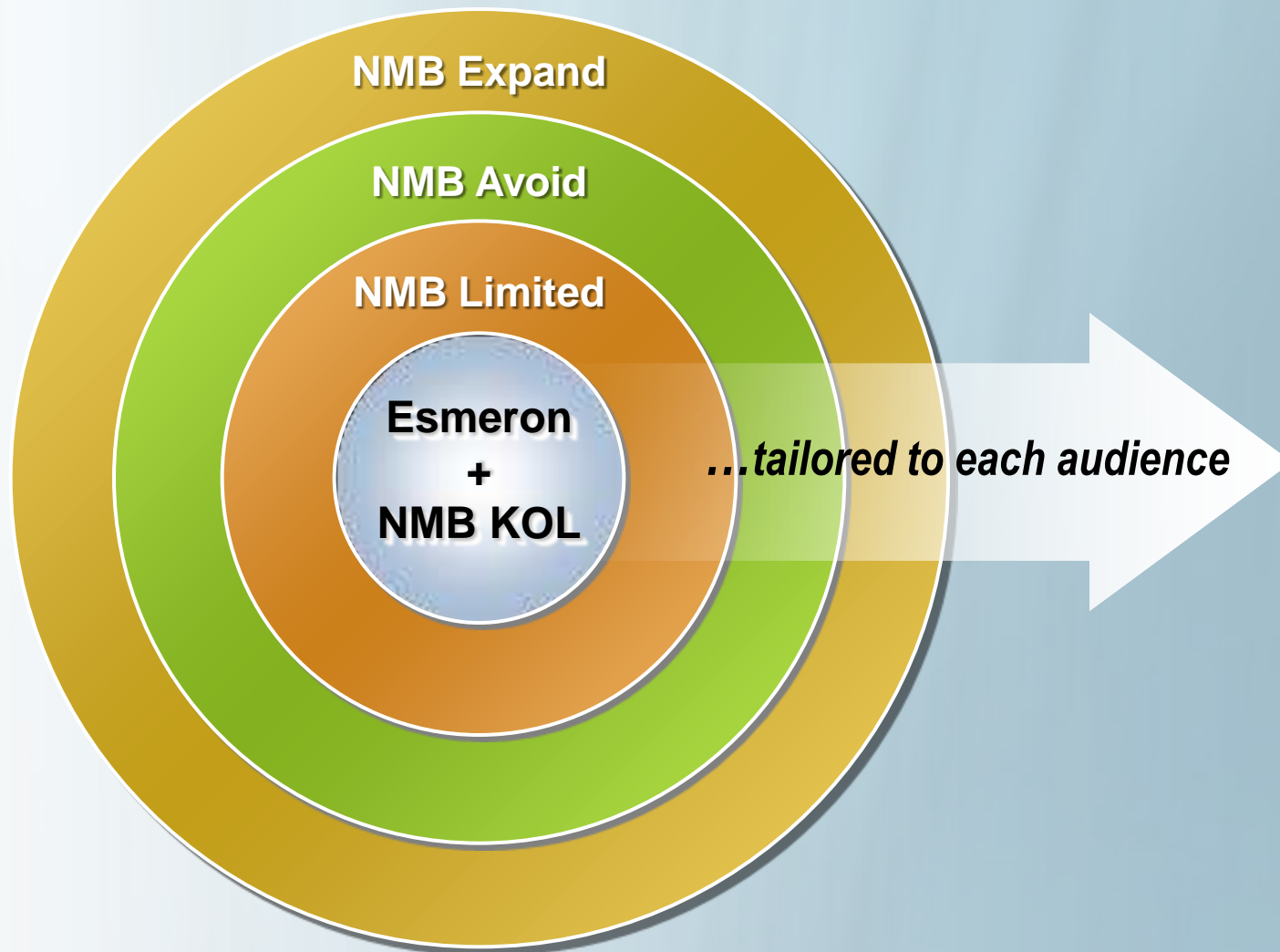
# Why Do New Technology Products Fail?

*For many reasons...*

*but renowned technology author Geoffrey Moore argues it is primarily because they never...*

***“Cross the Chasm”***

# Targeted Market Growth



# Stakeholder Insights: Surgical Team

- **Surgeons**

- Highlighting positive impact on patient
- outcomes will be key to improving dialogue between anaesthesiologist and surgeon

*Where we are:*

- *View anaesthesiologist as important technical assistant in OR*
- *Rely on anaesthesiologist to make best choice*



*Where we want to be:*

- *Surgery team aligned on NMB*
- *Surgeons embrace Sugammadex benefits*

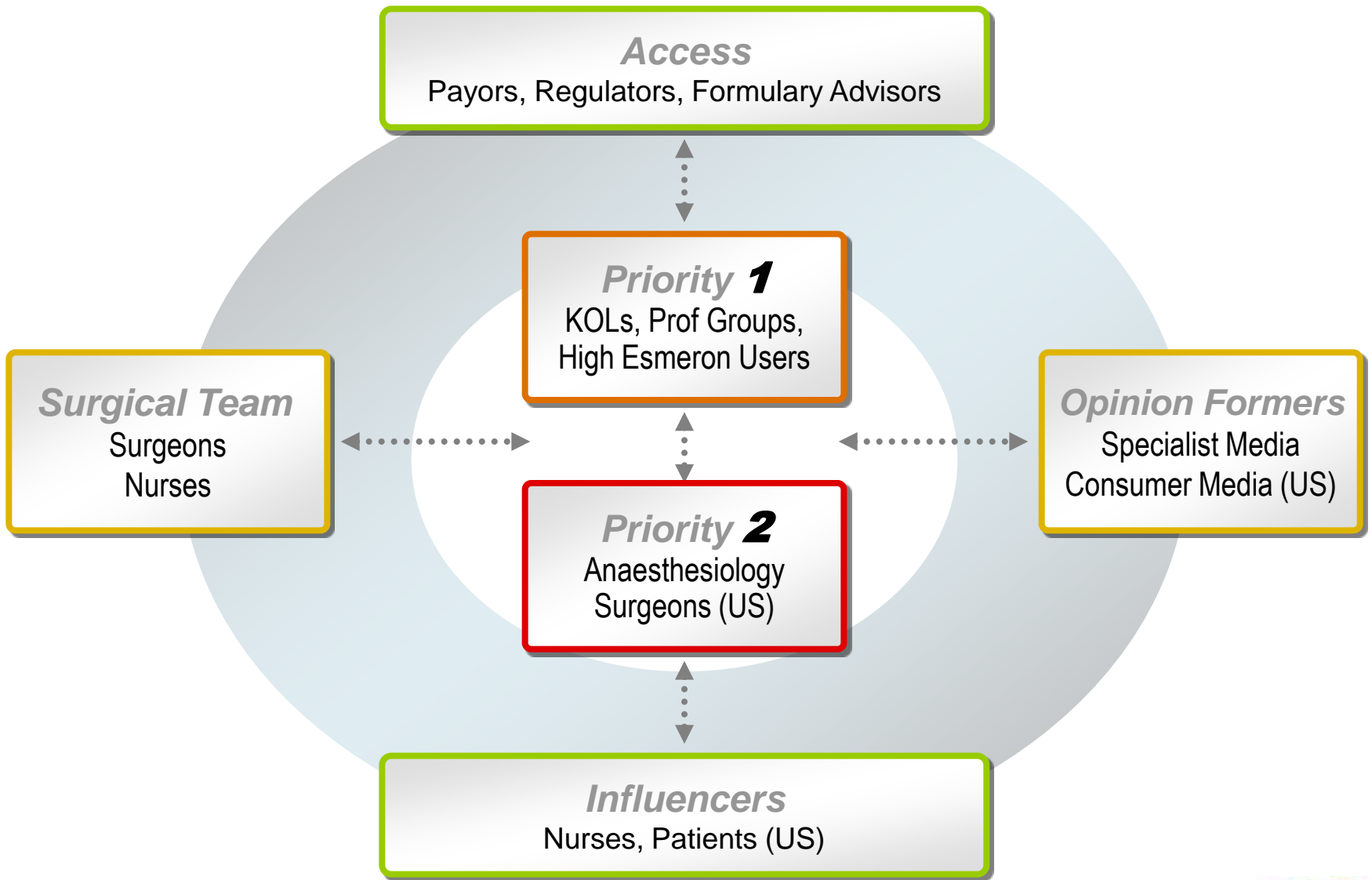
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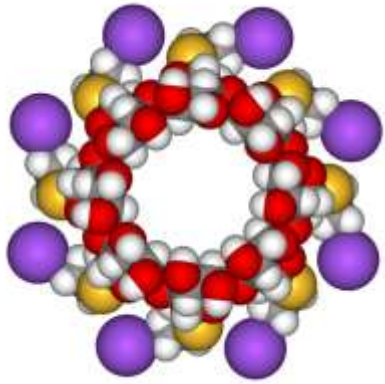


# *Strategic Approach*



# The Communications Landscape





*Communications Theme*

# AurORA

**A**chieving **O**ptimal **R**esults in **A**nesthesia